

VoIP / Unified Communications RFP Template

2026 Edition

A comprehensive, ready-to-customize RFP for evaluating cloud business phone and unified communications (UCaaS) platforms — updated for 2026.

Organization	Document Type	Date Issued	Version
[Your Organization Name]	Request for Proposal	[Month Day, Year]	2026.1

HOW TO USE THIS TEMPLATE: Fill in every field marked [like this]. Remove sections that don't apply to your organization. Distribute to shortlisted vendors and ask them to respond in-line or in a separate document.

PART ONE General Information

1.1 Procurement Timeline

Milestone	Target Date
RFP Release Date	[Month Day, Year]
Deadline for Vendor Questions	[Month Day, Year]
Responses to Questions Posted	[Month Day, Year]
Proposals Due	[Month Day, Year — Time — Timezone]
Finalist Demos / Interviews	[Month Day, Year]
Notice of Award	[Month Day, Year]
Target Go-Live Date	[Month Day, Year]

1.2 Designated RFP Contact

Field	Information
Name	[Contact Name]
Title	[Title]
Email	[contact@organization.com]
Phone	[555-555-5555]

All vendor questions must be submitted in writing to the contact above by the question deadline.

1.3 Organization Overview

Provide a 1–2 paragraph description of your organization: industry, mission, number of employees, number of locations, and why you are seeking a new communications solution.

Organization overview — complete before distributing this RFP

1.4 Scope of Work & Scale

We are soliciting proposals for a cloud-based VoIP / Unified Communications as a Service (UCaaS) solution. The selected platform must support all locations and user types described below.

Current environment being replaced: *[On-premises PBX / legacy VoIP / hosted service — vendor name if known]*

Primary reason for replacement: *[End-of-life / capacity / remote work / cost / capabilities]*

Scale Factor	Count / Detail
Total Users Requiring Phone Service	<i>[XXX]</i>
Peak Simultaneous Calls	<i>[XXX]</i>
Contact Center Agent Seats	<i>[XXX — or N/A]</i>
Number of Physical Locations	<i>[XXX]</i>
Fax Lines Required	<i>[XXX — or N/A]</i>
Toll-Free Numbers Required	<i>[XXX — or N/A]</i>
International Calling Destinations	<i>[List countries, or N/A]</i>
IP Phone Hardware Required	<i>[Yes / No / Partial — describe]</i>

Location Details

Location	City, State	Users	Desk Phones	Special Requirements
Headquarters	<i>[City, State]</i>	<i>[XXX]</i>	<i>[XXX]</i>	<i>[Reception, lobby, conf. rooms]</i>
Branch Office 1	<i>[City, State]</i>	<i>[XXX]</i>	<i>[XXX]</i>	<i>[Remote-only users]</i>
Branch Office 2	<i>[City, State]</i>	<i>[XXX]</i>	<i>[XXX]</i>	
(Add rows as needed)				

PART TWO System Requirements

Instructions for vendors: For each requirement, indicate Standard (included in base price), Add-On (extra cost), or Not Available.

2.1 Calling & Routing

- ☐ Cloud-hosted PBX / SIP Trunking
- ☐ Multi-level Auto-Attendant / IVR
- ☐ 3-digit extension dialing across all locations
- ☐ Direct Inward & Outward Dialing (DID / DOD)
- ☐ Hunt Groups / Ring Groups
- ☐ Call Queues with hold music, callback option, and queue position announcements
- ☐ Call Forwarding — always, busy, no answer, selective
- ☐ Call Park and Pickup Groups
- ☐ Call Transfer — blind and supervised
- ☐ Find Me / Follow Me / Simultaneous Ring

- ☐ Do Not Disturb (DND)
- ☐ Busy Lamp Field (BLF) / Presence Indicators
- ☐ Corporate Directory — searchable by name, extension, group, location
- ☐ Caller ID — inbound and outbound with name display
- ☐ E911 — location-aware per site, street address delivered to PSAP (Kari's Law / RAY BAUM's Act)
- ☐ Custom holiday and after-hours greetings (admin-managed)
- ☐ Number Porting from existing carrier(s)
- ☐ Electronic Fax (e-Fax to email — inbound and outbound)

2.2 Voicemail & Messaging

- ☐ Voicemail with Message Waiting Indicator (MWI)
- ☐ Voicemail-to-Email (audio file attachment)
- ☐ AI-powered Voicemail Transcription
- ☐ Visual Voicemail on mobile and desktop apps
- ☐ One-tap callback from voicemail
- ☐ Voicemail disabled per extension (admin-controlled)
- ☐ Business Team Messaging / Persistent Chat Channels
- ☐ SMS / MMS from business phone numbers
- ☐ Unified Inbox — calls, voicemail, messages, and fax in one view

2.3 Video & Collaboration

- ☐ HD Video Meetings with screen sharing
- ☐ Meeting Recording with cloud storage
- ☐ Virtual Backgrounds
- ☐ Conference Bridge — minimum [XX] participants
- ☐ File Sharing in meetings and team chat
- ☐ Webinar / Town Hall capability
- ☐ AI-generated meeting transcription and summaries

2.4 Mobile & Remote Work

- ☐ Mobile App — iOS (current + prior major version)
- ☐ Mobile App — Android (current + prior major version)
- ☐ Desktop Softphone — Windows and macOS
- ☐ Web Browser Client — no download required
- ☐ Hot-Desking / Hot Office — any user on any phone
- ☐ Work-from-Home Failover — calls route to softphone or mobile if office unreachable
- ☐ Wi-Fi Calling (calls over data, no cellular minutes consumed)

2.5a AI Capabilities

AI capabilities are increasingly common requirements in modern UCaaS evaluations. These capabilities reduce call volume, improve response times, and free up staff for higher-value work.

- ☐ AI Auto-Attendant / AI Receptionist — inbound call handling, FAQs, routing, and human escalation
- ☐ Conversational AI / Virtual Agent — FAQs, appointment booking, lead qualification, and account lookups
- ☐ AI-Powered Call Routing — intent detection and intelligent queue or employee routing
- ☐ AI Call Summarization — automatic post-call summaries delivered to CRM, email, or other systems
- ☐ AI Voicemail Transcription — automatic voicemail-to-text transcription
- ☐ AI Agent Assist — real-time guidance, suggested responses, and contextual information
- ☐ Sentiment Analysis — customer sentiment detection across voice and digital interactions
- ☐ AI-Generated Meeting Transcription and Summaries — searchable transcripts, summaries, and action items
- ☐ Automated Follow-Up — post-interaction messages, tasks, CRM updates, or workflow triggers
- ☐ Multilingual AI — supported languages across required voice and digital channels
- ☐ AI Noise Cancellation — background noise reduction during calls

2.5b AI Governance, Data, and Usage Requirements

- ☐ Knowledge-Source Controls — approved websites, documents, FAQs, CRM data, and knowledge bases
- ☐ Accuracy and Fallback Controls — performance testing, uncertainty handling, and fallback rules
- ☐ Human Escalation and Override — human handoff, review, correction, and override controls
- ☐ Audit and Monitoring Controls — interaction logs, outcomes, configuration changes, and escalation history
- ☐ AI Data Retention and Use — retention and processing of prompts, transcripts, recordings, and customer data
- ☐ Model-Training Policy — customer data use for model training and available opt-out controls
- ☐ AI Subprocessors — third-party AI providers and customer data processed
- ☐ Usage Limits and Overage Pricing — usage measurement, plan limits, and overage charges
- ☐ Accessibility Support — speech, hearing, language, captioning, and related accessibility features

Please describe your AI product roadmap for the next 12–18 months:

Vendor response:

2.6 Administration & Reporting

- ☐ Web-Based Admin Portal — manage users, numbers, settings without vendor involvement (MACD)
- ☐ End-User Self-Service Portal
- ☐ Role-Based Access Control — admin, manager, and user permission levels
- ☐ Real-Time Analytics Dashboard
- ☐ Historical Reporting by date range, user, group, location
- ☐ Call Recording — on-demand or always-on, manager-controlled

- ☐ Call Recording Storage — minimum [XX] months, cloud-based
- ☐ Call Log Export (CSV and API access)
- ☐ Active Directory / SSO Integration (SAML 2.0, Azure AD, Okta)
- ☐ Number Porting management via self-service portal

2.7 Integrations

For each integration, indicate: Native (built-in, no extra cost), Partner (certified partner app), API (custom build required), or Not Available.

Integration	Required / Preferred	Support Method	Notes
Salesforce CRM	Required	[Vendor response]	
HubSpot CRM	Preferred	[Vendor response]	
Microsoft Teams	Required	[Vendor response]	
Microsoft 365 / Outlook	Required	[Vendor response]	
Google Workspace	Preferred	[Vendor response]	
ServiceNow / Ticketing	Preferred	[Vendor response]	
Electronic Health Record (EHR)	[Required / N/A]	[Vendor response]	
[Other — add as needed]			

Describe your REST API and webhook capabilities for custom integrations:

Vendor response:

2.8 Call Center / Contact Center

Complete this section only if call center functionality is required. If not applicable, mark N/A and skip to Section 2.9.

License count needed: [XXX] Agent Licenses | [XXX] Supervisor Licenses

ROUTING & QUEUE MANAGEMENT

- ☐ Automatic Call Distributor (ACD)
- ☐ Skill-Based Routing
- ☐ Priority Routing
- ☐ Round-Robin / Longest Idle / Linear Hunt
- ☐ Overflow Routing to external number or voicemail
- ☐ Callback / Virtual Hold — caller opts out of queue and receives a callback
- ☐ Queue Announcements — position and estimated wait time
- ☐ AI-Powered Intelligent Routing — intent-based queue placement

AGENT TOOLS

- ☐ Agent Login / Logout per Queue
- ☐ Wrap-Up / After-Call Work (ACW) Timer
- ☐ Screen Pop — CRM data displayed on inbound call
- ☐ Silent Monitoring / Whisper Coaching / Barge-In

- ☐ Disposition Codes / Call Tagging
- ☐ AI Agent Assist — real-time on-screen guidance during calls
- ☐ Internal Agent Chat and Supervisor Escalation

OMNICHANNEL (IF APPLICABLE)

- ☐ Email Channel
- ☐ Live Chat / Web Chat
- ☐ SMS / MMS
- ☐ Social Media (Facebook, Instagram, X/Twitter)
- ☐ WhatsApp Business
- ☐ Unified Agent Desktop — all channels in a single view

CONTACT CENTER REPORTING

- ☐ Real-Time Wallboard / Supervisor Dashboard
- ☐ Agent Performance Reports (calls handled, Average Handle Time, CSAT)
- ☐ Queue Performance Reports
- ☐ Service Level Agreement (SLA) Tracking
- ☐ Custom Report Builder / Export to CSV or BI tool

2.9 Security & Compliance

For each item, provide certification date and details. Indicate Pending if in progress. If compliance is achieved through a subprocessor, identify the subprocessor.

Requirement	Certified (Y / N / Pending)	Certification Date & Details
SOC 2 Type II	[Vendor response]	[Date / Audit period]
HIPAA — Business Associate Agreement (BAA) provided	[Vendor response]	
PCI DSS (if payment card data is handled)	[Vendor response]	
GDPR Compliance	[Vendor response]	
FedRAMP (government / regulated sectors)	[Vendor response]	
E911 — Kari's Law & RAY BAUM's Act	[Vendor response]	
TLS Encryption (calls and data in transit)	[Vendor response]	
AES-256 Encryption (data at rest)	[Vendor response]	
SRTP (media stream encryption)	[Vendor response]	
Multi-Factor Authentication (MFA) enforced	[Vendor response]	
SSO / SAML 2.0 Support	[Vendor response]	

Data Residency: Where is customer data stored? Can US-only residency be guaranteed?

Vendor response:

Penetration Testing: How often is penetration testing conducted? Can results be shared under NDA?

Vendor response:

2.10 Infrastructure, Reliability & SLAs

SLA Requirement	Our Minimum Standard	Vendor Commitment
Uptime SLA	99.99% ("four nines")	<i>[Vendor response — include SLA credit terms]</i>
Planned Maintenance Notification	72-hour advance notice	<i>[Vendor response]</i>
P1 Incident Acknowledgment (service down)	< 15 minutes	<i>[Vendor response]</i>
P1 Incident Resolution	< 4 hours	<i>[Vendor response]</i>
Bandwidth per Concurrent Call	Vendor to specify	<i>[Codec, kbps]</i>
QoS — DSCP/ToS Marking	Required	<i>[Y / N / Details]</i>
Geographic Redundancy	Active-active or active-passive	<i>[Vendor response]</i>
Disaster Recovery RTO	< 4 hours	<i>[Vendor response]</i>
Disaster Recovery RPO	< 1 hour	<i>[Vendor response]</i>

2.11 Support & Implementation

Support Factor	Our Requirement	Vendor Offering
Standard Support Hours	Monday–Friday, 8am–6pm local time	<i>[Vendor response]</i>
24/7/365 Emergency Support	Required for P1 issues	<i>[Describe process]</i>
Support Channels	Phone, Chat, Email, Online Portal	<i>[Vendor response]</i>
Dedicated Account Manager	Required	<i>[Y / N]</i>
Customer Success Manager	Preferred	<i>[Y / N]</i>

Describe your standard implementation project plan for an organization of our size, including key milestones and expected go-live timeline:

Vendor response:

Describe end-user and administrator training — live sessions, on-demand video library, and documentation:

Vendor response:

PART THREE Pricing & Commercial Terms

3.1 Pricing Summary

Provide all-in monthly pricing for our configuration. Include any fees not listed below. We will evaluate based on 3-year Total Cost of Ownership (TCO).

Line Item	Unit Price / Month	Qty	Monthly Total
Standard User License	\$	<i>[XXX]</i>	\$
Contact Center Agent License	\$	<i>[XXX]</i>	\$
AI Features (if separately licensed)	\$	<i>[XXX]</i>	\$
Local DID Numbers	\$	<i>[XXX]</i>	\$

Toll-Free Numbers	\$	[XXX]	\$
Fax Lines	\$	[XXX]	\$
Implementation / Setup (one-time fee)	\$	1	\$
IP Phone Hardware (if applicable)	\$	[XXX]	\$
Estimated Monthly Recurring Total	\$	\$	\$
Year 1 Total (recurring + setup + hardware)	\$	\$	\$
3-Year TCO	\$	\$	\$

3.2 Contract Terms

Term	Vendor Response
Minimum Contract Length	[e.g., 1 / 2 / 3 years]
Volume Discount Thresholds	[Describe tiers]
Annual Price Escalation Cap	[CPI-capped / fixed / % per year]
Termination for Convenience	[Y / N — and any early-termination penalty]
Data Portability on Termination	[Describe export process and timeline]

PART FOUR Vendor Qualifications

4.1 Company Background

Q1. How long has your company been providing cloud communications / UCaaS services?

Vendor response:

Q2. What is your total active customer count and average customer size (employees)?

Vendor response:

Q3. Describe any pending or recent acquisitions, mergers, private equity ownership, or ownership changes in the past 24 months.

Vendor response:

Q4. What percentage of your R&D investment is directed toward AI and next-generation communications features?

Vendor response:

4.2 Customer References

Provide 3 references of similar size and/or industry. We may contact references during the evaluation process.

#	Company Name	Industry	Contact Name & Email	Deployment Size	Live Since
1				[Users]	
2				[Users]	
3				[Users]	

PART FIVE Evaluation & Submission

5.1 Vendor Evaluation Scorecard

All proposals will be scored against the following weighted criteria. Finalists will be invited for a live demonstration evaluated against the same framework.

Evaluation Criteria	Weight	Score (1-5)
Technical Requirements Fulfillment	35%	
Total Cost of Ownership — 3-Year	25%	
AI & Innovation Capabilities	15%	
Implementation Quality & Timeline	10%	
Security & Compliance Certifications	10%	
Vendor Stability & References	5%	
Total	100%	

5.2 Submission Requirements

All proposals must include the following. Incomplete submissions may be disqualified.

- ☐ Cover letter signed by an authorized representative
- ☐ Executive summary (maximum 2 pages)
- ☐ Completed requirements checklist (Part Two) — indicate Standard / Add-On / Not Available for every item
- ☐ Completed pricing table (Part Three) including 3-year TCO
- ☐ Sample SLA Agreement
- ☐ Sample BAA — if HIPAA compliance is required
- ☐ SOC 2 Type II report summary or attestation letter
- ☐ Sample implementation project plan / timeline
- ☐ Three customer references (Section 4.2)

Submission method: Email to [designated contact email]

Submission deadline: [Date, Time, Timezone]

Accepted formats: PDF or DOCX. One file per submission, labeled with vendor name.