

**RFP 22-68650 BUSINESS PROPOSAL
ATTACHMENT E**

Instructions: Please provide answers in the shaded areas to all questions. Reference all attachments in the shaded area.

Business Proposal

- 2.3.1 General** - Please introduce or summarize any information the Respondent deems relevant or important to the State's successful acquisition of the products and/or services requested in this RFP.

Avtex Solutions LLC, a TTEC Digital Company is a full-service Customer Experience consultancy focused on helping organizations fuel exceptional customer experiences. Our breadth of knowledge uniquely positions us to assist in the identification, deployment and optimization of technology platforms that support the customer journey. As a peer-recognized consulting firm, we guide organizations through the process of creating or improving CX strategies, platforms and policies. Avtex is a Gold partner with Genesys and is the largest Genesys partner worldwide, with nearly 700 Genesys clients. We have been in partnership with Genesys for more than 20 years and have been the partner of the year every year since 1997. Avtex has 103 Genesys certified engineers with 360 certifications.

Avtex has been in business since 1972. We have been selling Genesys Cloud (formerly PureCloud) since it was released in 2015. We currently have more than 130 clients on Genesys Cloud. Through organic growth and strategic acquisitions, Avtex has continued to grow in size, service offerings and reach year over year. Our longstanding history of sound financial performance, including consistent revenue growth, positive income and cash flow, and a very solid balance sheet has us very confident for our financial future. Based on recent history, we forecast minimum revenue growth of 10% to 15% annually over the next few years.

Avtex At-a-Glance

- More than 550 employees in offices throughout the United States and Canada
- More than 1,500 clients in dozens of industries
- \$169.3 million in revenue in 2020
- Customer Satisfaction (CSAT) rate of 4.96 out of 5.0
- 67% win rate with less than 4% churn
- Genesys' 2020 Global Partner of the Year and Genesys partner for 20+ years
- Dedicated State and Local Government Team

- 2.3.2 Respondent's Company Structure** - Please include in this section the legal form of the Respondent's business organization, the state in which formed (accompanied by a certificate of authority), the types of business ventures in which the organization is involved, and a chart of the organization. If the organization includes more than one (1) product division, the division responsible for the development and marketing of the requested products and/or services in the United States must be described in more

detail than other components of the organization. Please enter your response below and indicate if any attachments are included.

Avtex Solutions, LLC is a TTEC Digital Company. TTEC Digital LLC is a subsidiary of TTEC Holdings, Inc., a publicly traded company. It was formed in the state of Minnesota.

Please see the attached Articles of Organization for Avtex.

- 2.3.3 Company Financial Information** - This section must include documents to demonstrate the Respondent's financial stability. Examples of acceptable documents include: most recent Dunn & Bradstreet Business Report (preferred) or audited financial statements for the two (2) most recently completed fiscal years. If neither of these can be provided, explain why and include an income statement and balance sheet, for each of the two most recently completed fiscal years.

If the documents being provided by the Respondent are those of a parent or holding company, additional information should be provided for the entity/organization directly responding to this RFP. That additional information should explain the business relationship between the entities and demonstrate the financial stability of the entity/organization which is directly responding to this RFP.

Please find attached a quarter 2 financial summary as well as annual reports for 2020 and 2019 for TTEC Holdings, Inc., our parent company.

In April 2021 Avtex became part of the TTEC Digital, LLC (a subsidiary of TTEC Holdings, Inc.) family, expanding our offerings, expertise, and technology partnerships as now of one of the largest global technology and services companies that develops end-to-end, digital customer experience solutions. TTEC Holdings, Inc. (NASDAQ: TTEC) is one of the largest, global CX (customer experience) technology and services innovators for end-to-end, digital CX solutions. The Company delivers leading CX technology and operational CX orchestration at scale through its proprietary cloud-based CXaaS (Customer Experience as a Service) platform. Serving iconic and disruptive brands, TTEC's outcome-based solutions span the entire enterprise, touch every virtual interaction channel, and improve each step of the customer journey. Leveraging next gen digital and cognitive technology, the Company's Digital business designs, builds, and operates omnichannel contact center technology, conversational messaging, CRM, automation (AI / ML and RPA), and analytics solutions. The Company's Engage business delivers digital customer engagement, customer acquisition & growth, content moderation, fraud prevention, and data annotation solutions. Founded in 1982, the Company's singular obsession with CX excellence has earned it leading client NPS scores across the globe. The company's nearly 58,500 employees operate on six continents and bring technology and humanity together to deliver happy customers and differentiated business results. To learn more visit us at www.ttec.com

- 2.3.4 Integrity of Company Structure and Financial Reporting** - This section must include a statement indicating that the CEO and/or CFO, of the responding

entity/organization, has taken personal responsibility for the thoroughness and correctness of any/all financial information supplied with this proposal. The particular areas of interest to the State in considering corporate responsibility include the following items: separation of audit functions from corporate boards and board members, if any, the manner in which the organization assures board integrity, and the separation of audit functions and consulting services. The State will consider the information offered in this section to determine the responsibility of the Respondent under IC 5-22-16-1(d).

TTEC is a publicly traded company. Demonstration of the integrity of the company structure and financial reporting can be found at: www.investors.ttec.com.

2.3.5 Contract Terms/Clauses - Please provide the requested information in RFP Section 2.3.5.

Avtex has reviewed your Sample Contract and we agree in principle with the terms and conditions noted in the contract. However, we also expect that that both parties will engage in mutually beneficial good faith discussions to mutually come to terms on any project-specific modifications to the contract. We look forward to having these discussions with you.

2.3.6 References - Reference information is captured on ATTACHMENT H. Respondent should complete the reference information portion of the ATTACHMENT H which includes the name, address, and telephone number of the client facility and the name, title, and phone/fax numbers of a person who may be contacted for further information if the State elects to do so. The rest of ATTACHMENT H should be completed by the reference and **emailed DIRECTLY** to the State. The State should receive three (3) ATTACHMENT Hs from clients for whom the Respondent has provided products and/or services that are the same or similar to those products and/or services requested in this RFP. ATTACHMENT H should be submitted to idoareferences@idoa.in.gov. Attachment I should be submitted no more than ten (10) business days after the proposal submission due date listed in Section 1.24 of the RFP. Please provide the customer information for each reference.

Customer 1	
Legal Name of Company or Governmental Entity	
Company Mailing Address	
Company City, State, Zip	
Company Website Address	
Contact Person	
Contact Title	
Company Telephone Number	
Company Fax Number	
Contact E-mail	
Industry of Company	

Customer 2	
Legal Name of Company or Governmental Entity	
Company Mailing Address	
Company City, State, Zip	
Company Website Address	
Contact Person	
Contact Title	
Company Telephone Number	
Company Fax Number	
Contact E-mail	
Industry of Company	
Customer 3	
Legal Name of Company or Governmental Entity	
Company Mailing Address	
Company City, State, Zip	
Company Website Address	
Contact Person	
Contact Title	
Company Telephone Number	
Company Fax Number	
Contact E-mail	
Industry of Company	

2.3.7 Registration to do Business - Selected out-of-state Respondents providing the products and/or services required by this RFP must be registered to do business within the State by the Indiana Secretary of State and the Indiana Department of Administration, Procurement Division. The address contact information for this office may be found in Section 1.18 of the RFP. This process must be concluded prior to contract negotiations with the State. It is the successful Respondent's responsibility to complete the required registration with the Secretary of State. Please indicate the status of registration, if applicable. Please clearly state if you are registered and if not provide an explanation.

Yes, Avtex is registered to do business in Indiana and our business status is "active". Please see the attached documentation.

2.3.8 Authorizing Document - Respondent personnel signing the Transmittal Letter of the proposal must be legally authorized by the organization to commit the organization contractually. This section shall contain proof of such authority. A copy of corporate bylaws or a corporate resolution adopted by the board of directors indicating this

authority will fulfill this requirement. Please enter your response below and indicate if any attachments are included.

As a Group VP, Bryce Gibson has the authority to sign contracts on behalf of Avtex. Please see attached Signature Authority Matrix chart.

- 2.3.9 Subcontractors** - The Respondent is responsible for the performance of any obligations that may result from this RFP, and shall not be relieved by the non-performance of any subcontractor. Any Respondent's proposal must identify all subcontractors and describe the contractual relationship between the Respondent and each subcontractor. Either a copy of the executed subcontract or a letter of agreement over the official signature of the firms involved must accompany each proposal.

Any subcontracts entered into by the Respondent must be in compliance with all State statutes, and will be subject to the provisions thereof. For each portion of the proposed products and services to be provided by a subcontractor, the technical proposal must include the identification of the functions to be provided by the subcontractor and the subcontractor's related qualifications and experience. The combined qualifications and experience of the Respondent and any or all subcontractors will be considered in the State's evaluation. The Respondent must furnish information to the State as to the amount of the subcontract, the qualifications of the subcontractor for guaranteeing performance, and any other data that may be required by the State. All subcontracts held by the Respondent must be made available upon request for inspection and examination by appropriate State officials, and such relationships must meet with the approval of the State.

The Respondent must list any subcontractor's name, address, and the state in which formed that are proposed to be used in providing the required products and/or services. The subcontractor's responsibilities under the proposal, anticipated dollar amount for subcontract, form of organization, and an indication from the subcontractor of a willingness to carry out these responsibilities are to be included for each subcontractor. This assurance in no way relieves the Respondent of any responsibilities in responding to this RFP or in completing the commitments documented in the proposal. The Respondent must indicate which, if any, subcontractors qualify as a Minority Business Enterprises or Women's Business Enterprises under IC 4-13-16.5-1. See Section 1.21 and Attachment A for Minority and Women's Business Enterprises information. Please enter your response below and indicate if any attachments are included.

Bucher + Christian Consulting, Inc. d/b/a BC*forward*
 9777 North College Avenue
 Indianapolis, IN 46280
 State Incorporated: Indiana
 Services to be provided: project management
 Estimated Sub-Contract Amount: \$368,907.00
 MBE

aFit Staffing, Inc.
 8925 N. Meridian Street, Suite 101
 Indianapolis, IN 46260
 State Incorporated: Indiana
 Services to be provided: end user software training
 Estimated Sub-Contract Amount: \$312,543.00
 WBE

3DGS, LLC
 4053 Burford Drive
 Carmel, IN 46074
 State Incorporated: Delaware (registered to do business in Indiana).
 Services to be provided: project management
 Estimated Sub-Contract Amount: \$158,235.00
 IVOSB

2.3.10 Reserved

2.3.11 General Information - Each Respondent must enter your company's general information including contact information.

Business Information	
Legal Name of Company	Avtex Solutions, LLC
Contact Name	Kelley Jacob
Contact Title	Account Executive
Contact E-mail Address	kjacob@avtex.com
Company Mailing Address	3500 American Blvd W. Suite 300
Company City, State, Zip	Bloomington, MN 55431
Company Telephone Number	713-554-9061
Company Fax Number	952-832-3722
Company Website Address	www.avtex.com
Federal Tax Identification Number (FTIN)	26-2002273
Number of Employees (company)	~600
Years of Experience	40
Number of U.S. Offices	Three (HQ in Minnesota and two satellite offices in Michigan and Washington, DC).
Year Indiana Office Established (if	We do not have a physical office in Indiana.

applicable)	However, of our ~600 employees who mostly work remotely, 48 have home offices in Indiana.
Parent Company (if applicable)	TTEC Digital, LLC
Revenues (\$MM, previous year)	\$169.3 million in 2020.
Revenues (\$MM, 2 years prior)	\$131.2 million in 2019. \$127.8 million in 2018.
% Of Revenue from Indiana customers	3% in 2020

- a. Does your Company have a formal disaster recovery plan? Please provide a yes/no response. If no, please provide an explanation of any alternative solution your company has to offer. If yes, please note and include as an attachment.

Yes. Please see the attached document, "Attachment 18 - Avtex 2021 Type II SOC2".

- b. What is your company's technology and process for securing any State information that is maintained within your company?

Avtex does not host, store, or process scoped customer data. Avtex does, however, maintain policies and procedures for data protection and management. Please see Avtex SOC2 for design and operating effectiveness of Avtex internal controls, including those for data security and technical implementations. Please see the attached document, "Attachment 18 - Avtex 2021 Type II SOC2".

2.3.12 Experience Serving State Governments - Please provide a brief description of your company's experience in serving state governments and/or quasi-governmental accounts.

For over 40 years Avtex has extensive experience working with government entities by providing consultation and resources to implement and support contact center technologies to federal, state and local government agencies. Through our deep experience and breadth of relationships we transform the way government workers connect with the people they serve.

2.3.13 Experience Serving Similar Clients - Please describe your company's experience in serving customers of a similar size to the State with similar scope. Please provide specific clients and detailed examples.

Due to confidentiality agreements with our clients, no specific names will be provided but we have implemented a very large healthcare organization that has a multi-state approach and many similar requirements as IOT.

Their transition to Genesys Cloud was a mixture between coming from PureConnect, InContact, and Avaya in their prior environment so we migrated them from both on premise and other cloud technology. Previously, there was a total of approximately 3,100 agents and they moved to a concurrent model with 1,550 concurrent users on the highest tier licenses, the Genesys Cloud 3. We permitted a 12-month ramp period for this project and each phase has different groups being transitioned.

We have around two to three weekly meetings with project managers from both Avtex and their team that covers general status and specific integration/implementation conversations as well.

There is only some of the final phase left and all deliverable have been on time while we focused on accurate execution of tasks and timeliness of our efforts.

- 2.3.14 Indiana Preferences** - Pursuant to IC 5-22-15-7, Respondent may claim only one (1) preference. For the purposes of this RFP, this limitation to claiming one (1) preference applies to Respondent's ability to claim eligibility for Buy Indiana points. **Respondent must clearly indicate which preference(s) they intend to claim. Additionally, the Respondent's Buy Indiana status must be finalized when the RFP response is submitted to the State.**

Additionally, Respondents that wish to claim the Buy Indiana preference (for any criteria listed below) must have an email confirmation of their Buy Indiana status provided by buyindianainvest@idoa.in.gov included in the proposal response. The email confirmation must have been provided from within one year prior to the proposal due date.

Buy Indiana

Refer to RFP Section 2.7 for additional information.

Avtex does not qualify for any of the stated preferences. Unfortunately, we cannot claim any of the Buy Indiana points.

2.3.15 Reserved

- 2.3.16 IOT Additional Terms and Conditions** - Additional Terms and Conditions related to Cloud-based systems that the State expects to execute with the successful Respondent(s) are provided in Attachment L1, L2, and L3. Depending on your proposed System, you could be required to agree to one or more of the following sets of Additional Terms and Conditions:

- Attachment L1 – IOT Additional Terms and Conditions - Infrastructure as a Service Engagements (IaaS)
- Attachment L2 – IOT Additional Terms and Conditions - Platform as a Service Engagements (PaaS)
- Attachment L3 – IOT Additional Terms and Conditions - Software as a Service Engagements (SaaS)

Please indicate in your response below which of these sets of Additional Terms and Conditions you believe applies to your proposed System. Review these Additional Terms and Conditions and indicate acceptance and/or any redlined edits, via Track Changes. It is the State's strong desire to not deviate from the Additional Terms and Conditions that provided in these attachments and as such the State reserves the right to reject any and all requested changes. Any or all portions of this RFP and any or all portions of your response may be incorporated as part of the final contract.

In addition to your response below, **Respondents are also required to review and respond to the questions included in Attachment P, IOT Cloud Provider Questions Form.**

Acknowledged. We have provided redlines to Attachment L3 (SaaS), as this is the one that would apply to Genesys Cloud. Please see the attached document, "Attachment L3 - IOT Additional Terms and Conditions - SaaS".