

STAGE 1 · NORTH STAR

Deliverable 1 of 4 · Engagement CS-2026-014

# Sourcing Brief

*A CCaaS migration sourcing brief for Acme Manufacturing – 78 locations, FDA-regulated medical device.*

<b>N</b> STAGE 1 <i>North Star</i>	<b>E</b> STAGE 2 <i>East Wind</i>	<b>S</b> STAGE 3 <i>South Spine</i>	<b>W</b> STAGE 4 <i>West Frontier</i>
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ENGAGEMENT	CS-2026-014	DATE ISSUED	June 14, 2026
CLIENT	Acme Manufacturing	SPONSOR	VP, Information Technology
INDUSTRY	Medical Device Mfg (FDA, ISO 13485)	SCOPE	Contact center + voice infrastructure

**EXECUTIVE SUMMARY**

**A**cmé Manufacturing is replacing a legacy Cisco on-premises contact center across 78 locations. The current platform is end-of-life in 2027 and fails to satisfy three operational requirements: 21 CFR Part 11 audit trails for clinical-affairs inbound calls, HIPAA-aware call recording with discoverable transcripts, and integration with the company's complaint management system (MasterControl).

**HOW WE REFRAMED THE REQUEST**

Not “we need a new CCaaS,” but “we need an FDA-aware contact center that supports 21 CFR Part 11 audit trails, HIPAA inbound handling, and MasterControl integration – deployable across 78 manufacturing and clinical-affairs sites without disrupting existing complaint-handling SOPs.”

**OUTCOME STATEMENT**

Replace the contact center stack with a HIPAA + 21 CFR Part 11 compliant CCaaS solution that integrates natively with MasterControl, supports **360 concurrent agents across 78 locations**, and reduces total cost of ownership by **at least 18% over a five-year horizon**.

**CURRENT STATE — INCUMBENT PLATFORM**

Cisco Unified Contact Center Enterprise (UCCE) 12.5, deployed 2017. On-premises infrastructure across two primary data centers (Indianapolis and Phoenix) with site survivability at 76 of 78 locations. End-of-software-maintenance scheduled for January 2027.

**EXHIBIT 1 – INCUMBENT CONTRACT STRUCTURE**

FY2025 actuals · annual run-rate

SERVICE	SUPPLIER	ANNUAL	RENEWS
UCCE Enterprise Licenses (360 seats)	Cisco	\$485,000	2027-01-15
Carrier voice (SIP, 240 sessions)	Lumen	\$168,000	2026-09-30
Call recording	Verint	\$94,000	2027-03-01
Workforce management	Aspect Software	\$72,000	2026-12-31
<b>Total annual</b>		<b>\$819,000</b>	

CURRENT STATE — OPERATIONAL METRICS

EXHIBIT 2 – OPERATIONAL METRICS, CURRENT

Trailing 12-month average

<b>8:22</b>	<b>71%</b>	<b>14,200</b>
Average handle time (min:sec)	First call resolution	Inbound calls / month

Concurrent agents at peak: **312 of 360** licensed

Integrations in use: **MasterControl, ServiceNow, Salesforce Service Cloud**

WHAT WE ARE ACTUALLY SOLVING FOR

## Three constraints define this engagement and shape every downstream decision.

- 1**      **21 CFR Part 11 audit compliance**

FDA inspection readiness requires that any system handling clinical-affairs or complaint-related communications produce tamper-evident audit trails. Most CCaaS vendors generate call recordings; few generate cryptographically-signed audit logs that satisfy 21 CFR Part 11 §11.10(e). The shortlist must include vendors with proven Part 11 implementations at peer device manufacturers.
- 2**      **MasterControl integration depth**

Acme's complaint-handling SOP requires that every inbound complaint call be created as a MasterControl complaint record within four minutes of call termination, with the full transcript attached. Off-the-shelf API integrations exist for most CCaaS vendors but field maturity varies widely. The shortlist must include vendors with production MasterControl deployments at scale.
- 3**      **Deployment risk tolerance**

The FDA Form 483 risk associated with disrupting complaint-handling continuity is high. Migration cannot put any individual site offline for more than four business hours, and rollback to UCCE must remain viable for the first 90 days post-cutover at every site.

SUCCESS CRITERIA

# What “done” means – and how each criterion is verified.

EXHIBIT 3 – DEFINITION OF DONE

Each criterion paired with its verification method

CRITERION	TARGET	VERIFICATION
21 CFR Part 11 compliance	Audit-ready by go-live	Third-party audit + FDA pre-inspection
MasterControl integration	≤ 4-min call→record	SLA monitoring during 30-day burn-in
Annual run-rate	≤ \$671,580 (-18%)	Year-1 financial reconciliation
Implementation	All 78 sites by 2026-12-31	Site-by-site cutover plan + tracker
Operational continuity	Zero unplanned outage > 4 hr	Incident log review

BUDGET ENVELOPE

Year-1 implementation budget: **\$1.1M one-time** (includes professional services, training, and the parallel-run period). Year-2+ run-rate target: **\$671,580 annually or below**.

Approved by VP, Information Technology and CFO on 2026-05-22. Subject to revised approval if final TCO exceeds the Year-2 target by more than 8%.

**STAKEHOLDERS**

VP, INFORMATION TECHNOLOGY	[Redacted] — Decision authority
DIR., QUALITY ASSURANCE	[Redacted] — FDA / Part 11 validation
DIR., CUSTOMER EXPERIENCE	[Redacted] — Operational requirements
MGR., IT INFRASTRUCTURE	[Redacted] — Technical implementation
EXTERNAL COUNSEL	[Redacted] — Contract review

**NEXT STEPS**

This Sourcing Brief is the Stage 1 deliverable in The Cardinal Method. Subsequent stages produce three additional deliverables:

**Benchmark Report (Stage 2 · East Wind)** – confirms CCaaS is the right category vs. alternatives, e.g. a voice-analytics overlay + UCaaS, or hybrid retention of UCCE for clinical-affairs only.

**Vendor Scorecard (Stage 3 · South Spine)** – qualified CCaaS vendors scored against Acme's specific weights, with 21 CFR Part 11 weighted at 25%.

**Decision Memo (Stage 4 · West Frontier)** – board-ready written recommendation with implementation plan.

END OF SOURCING BRIEF · STAGE 1 OF 4

