RFP 606 - Customer Relations Management System (CRM) for the Graduate School

** This Addendum POSTPONES THE OPENING for RFP 606. **

Bids for RFP 606 will now be due at 11:00 am on Thursday, January 18, 2018.

** THIS ADDENDUM AMENDS THE REQUEST FOR PROPOSAL **

THIS IS TO LET PROPOSERS KNOW THAT THIS REQUEST FOR PROPOSAL HAS BEEN AMENDED WITH THE FOLLOWING QUESTIONS AND ANSWERS.

1. Does this project include all Graduate Programs? Including Online Programs?
   Yes.
2. How many staff, faculty, and student workers will need to have access and are expected to use the CRM Solution? Please break down numbers by type or role.
   At least fifty (50) which are faculty and graduate school staff.
3. Does UM Graduate School have a current CRM? If so, which solution?
   No.
4. If there is a CRM currently in use, how is UM Graduate School integrating it with your Student Information System today?
   No, there isn’t a system in place.
5. Is the preference/requirement of UM Graduate School to utilize an implementation partner to execute the project? If so, has one already been selected?
   The UM Graduate School has not selected a CRM vendor/partner and will possibly select a CRM vendor from the submitting proposals.
6. Why is UM Graduate School seeking a new CRM?
   The UM Graduate School currently does not have an implemented CRM.

7. Is the intent of UM Graduate School to collect & process applications directly via the new CRM?
   No.

8. How does UM Graduate School currently mass email prospects, applicants, and enrolled students? Please specify which solution is used and how many contacts are stored in the current tool.
   Prospective students are contacted manually. Enrolled students are mass emailed through our student information system.

9. How many emails are anticipated to be sent out on an annual basis?
   Each prospective student will receive batches of information sent from either the graduate school or their respective department of interest. Therefore, the exact number cannot be determined as there aren’t any prior analytics to reference.

10. What is the current Student Information System?
    SAP.

11. Has budget been allocated for this project?
    Yes.

12. Please share the project timeline.

   1. Previous RFP Deadline: December 14, 2017
   2. New RFP Deadline: January 18, 2018
   3. Review of proposals: by January 31, 2018 (This date is an estimate, but we will do our best to meet this timeline if possible.)
   4. The University reserves the right to request best and final offers from the top ranked proposals and will furnish a due date for those offers at the time of request.
   5. A time line for contracts, implementation, and go live date will be discussed with the chosen vendor after a decision has been made.

13. The solution must provide seamless integration with ongoing data collection and existing surveys created using current vendor:
   1. What is/are the current data collections? Manual.
   2. What is the existing survey tool utilized? Any open forum survey tool that converts data into a spreadsheet or any delimited document.

14. Current systems:
   1. What is the current college search and planning web sites / where do leads come from?
      We gather leads directly from other universities, testing services, and possible future accounts with sites such as graduate school match and education connection.
2. What is the current online application utilized (integrating with the online application)? SAP houses our UM developed application system.

3. How is the current student portal housed / on what tool or system? There is wording stating utilizing the existing portal and wording around a prospective student portal - is a new student portal desired?
   No, we do not desire a new application system at this time. We would like the CRM to have functionality that can access the application status of a prospective student. This functionality will be developed jointly with UM IT.

4. There is wording around utilizing the existing online application, and wording for prospect to check their application status in a portal. Is a new online application (which is typically a portal) desired?
   No.

5. What event management tool is currently utilized?
   We have created our own surveys and documents in the past to manage on campus events.

6. What is the current phone system utilized and is there an existing CTI connection?
   The University currently uses the Avaya on premise phone system without a CTI connection. However, we expect that the solution chosen will function with any phone system without any additional incurred costs.

15. Please describe the current lead and prospect management processes and workflows / how many workflows are desired?
   1. Prospective student information will either be collected manually and then entered or entered via a form online.
   2. This information is then accessed by the graduate school and subsequent departments of interest.
   3. The student is then entered into this funnel of communications that hopefully lead them to a completed application.
   4. Upon acceptance in a program, CRM functionalities will no longer be employed for that student.

16. Data Conversion / Integration:
   1. What is the amount of data that needs to be converted or migrated into the CRM / volume?
      Application status from our system to the CRM for each prospective student. If the CRM supports live pull, there may not be a need to migrate existing as it would pick-up from our SIS. Our system has the ability to sync in any modern form: API, JSON, XML, etc.
2. How many fields (headers) are to be converted?
   Currently, just one - application status.

3. What is the desired approach for integrating with the SIS (batch load, automated batch load, real time, bi-directional)?
   Real-time preferred, one-directional pull request from CRM for live data.
   Secondary could support API push from SIS side if needed to better support reporting options out of the CRM

4. Does the University have a middleware tool already in use for integrations? If not, is there a desired tool (MuleSoft, Jitterbit, Informatica, etc.)?
   There is no middleware tool. Any integrations will be developed from within our SIS.

17. Would you be able to provide a Word document of the RFP?
   Yes, with limitations. Please go to http://procurement.olemiss.edu/bid-file/ and look under RFP 606. Please note – not all pages of the RFP are available in Word. If any discrepancy is found in the Word document version and the original RFP 606 documents maintained in the University of Mississippi Procurement Services department and posted online as a pdf, the documents maintained by Procurement Services take precedence.

18. The December 14th timeline is a quick turnaround due to the holidays and having certain resources unavailable. Could we request a two-week extension to make sure we cover all your needs for this RFP?
   Yes. We will extend the deadline to January 18, 2018.

19. Is the undergraduate program using a CRM that the Graduate school is considering? If so, what are they using?
   The University of Mississippi undergraduate admissions office does have an implemented CRM. However, their solution doesn’t have any bearing on the solution that the Graduate School will choose.

20. Does The University of Mississippi Graduate School currently use an email marketing solution?
    No

21. How many unique email addresses does The University of Mississippi Graduate School include in email marketing campaigns?
    Currently, only one, but this will likely change given the usage of a tool that mass markets to groups based on their academic interest.

22. How many users will use SMS texting and what is the anticipated volume?
    All users will be granted this feature however anticipated usage is unknown at this time.
23. What level of Social Media Integration is The University of Mississippi Graduate School looking for?

These are avenues that we will visit once our CRM is implemented. If there are options associated with the product that would better assist us in marketing our programs and enticing our prospective students, we will consider utilizing those after we have implemented a fully functional CRM.

A statement should be included in your proposal indicating that you acknowledge this Addendum #1.

PLEASE SEND AN E-MAIL TO fbkemp@olemiss.edu ACKNOWLEDGING THIS ADDENDUM.