University Information Technology Services

ADDENDUM #1
RFP #L201902

Request for Proposals for Enterprise CRM

Please mark all proposal submission Envelopes with the following information

Sealed RFP #L201902
Due on November 30, 2018 no later than 5:00 PM, MST
Q1. Would the University of Arizona allow for an additional week to respond to this RFP given the impending holiday that is approaching?

No. The impending holiday was considered when choosing the November 30th deadline.

Q2. For clarification, will this be an enterprise-level implementation (across the entire organization) or will the implementation be specific to one or more departments, offices, or campuses? If the latter, could you verify the names of those departments/offices/campuses?

The implementation is across the entire enterprise for all constituent types. The implementation will be incremental and in priority order. The names of departments, offices, and campuses can be found on the University of Arizona’s public website.

Q3. Given the many functions available through a CRM system, would you be open to a phased implementation? That is, is certain CRM functionality required to "go live" before other CRM functionality and, if so, could you prioritize which CRM functionality -- in general -- you would like to "go live" first, second, third, etc.?

The implementation will be phased, with student success, student service, student engagement, and university marketing and communications use cases given early priority.

Q4. Is the university currently using a CRM system? If so, could you point out for us what you consider to be its two or three biggest strengths? Likewise, could you also point out its two or three biggest weaknesses?

The University of Arizona does not currently have an enterprise CRM. There are currently 8 small instances of Salesforce in use in individual departments, as well as use of Technolutions Slate for student recruiting and admissions. The weakness of these implementations is their stand-alone nature and lack of integration across and with enterprise systems.

Q5. What are the three most important goals that you seek to achieve through the implementation of a new CRM system?

Improve student retention, by supporting student advising and retention programs along with enhancing overall student engagement. Improve student service and reduce time to issue resolution during peak periods within the academic year. Support alumni and community engagement goals.

Q6. Regarding constituent communications through the new CRM system, what do you want to accomplish that your current methods of communication with constituents (students, staff, prospects, etc.) do not accomplish to the satisfaction of the university?

Institutional visibility, and ability to more intentionally engage students, alumni, and others. Cross-organizational collaboration on important interactions.

Q7. Is there any one communication channel that you use more often than others to communicate with your students? If so, can you provide us with the identity of that channel (email, chat, etc.) and provide insight as to why you prefer that channel?

Email remains a primary channel of communication with students. Despite assumptions often made that they don’t read it, they regularly report it as important and preferred for many communications. Text messages, social, and appropriately metered push notifications are also important aspects of our communication strategy, as is live chat. We anticipate that chatbot technology will become more important in the future, and expect to begin early proof of concept work.
Q8. After receiving vendor replies, can you inform us as to what will be the next step in the decision-making process for this potential procurement?

Next steps will be determined based on scoring outcomes from the proposals that are due by November 30th, with UofA either selecting a winner based on that scoring (if it’s clear) or requesting on-site demos (if a winner is not apparent).

Q9. Can you verify the desired (or expected) length of the contract for this procurement?

We expect to enter into a 3-5 yr contract for this procurement.

Q10. Can the university provide a list of systems/applications with which the new CRM would need to interface/integrate?

PeopleSoft Campus Solutions, PeopleSoft HCM, Technolutions Slate, D2L, Shibboleth SSO + Duo (for MFA), EDS (UofA's person registry), Integration platform (TBD). Handshake, ex libris (library), housing and residential system, plus an assortment of other systems across the bookstore, student life, parking and transportation, etc.

Q11. If there is any particular communication-related problem that you would like to correct more than any other via your new CRM, what is the nature of that issue?

Institutional visibility, and ability to more intentionally engage students, alumni, and others. Cross-organizational collaboration on important interactions.

Q12. In the last six months, which vendors representing full enterprise CRM solutions have provided demonstrations for the University of Arizona?

No vendors have provided a demonstration to UITS for use of CRM across the enterprise.

Q13. Will there be a down-select process? That is, will the evaluation committee down-select to, say, the two or three top bids and then select the final contract winner from those candidates? Or, will the university use the more straightforward method of selecting the winner without going through a down-select process?

The university will seek the most straightforward method for selecting a winner, and may choose a winner based solely on the merit of proposals received by November 30th.

END OF ADDENDUM