Listed below are vendor questions that were received prior to the requested deadline and the corresponding answers for RFB# AA17-RH-5130 – Contract: Consulting & Professional Services for the Implementation of Salesforce CRM Solutions for the Isenberg School per the following specifications or approved equal.

There has been a delay in answering all of the vendor questions. Consequently, the date to reply to all vendor questions has been REVISED to: Wednesday, September 14, 2016.

The original bid opening date was scheduled for September 15, 2016 @ 1:00 pm EDT

The bid opening date has been REVISED to open on September 23, 2016 @ 1:00 EDT

Question # 1: Section 1.2.1 – Item A – Is the plan to continue utilizing the existing intakes, or are there modifications either planned, or to be considered as part of the process?

Answer # 1:

Question # 2: Section 1.2.10 – Item A – Is there an existing datamart in use for integrated to Spire?

Answer # 2:

Question # 3: Section 1.2.10 – Item A – Will your partner engage with the datamart, if it is in use? Or will your partner have responsibility for engaging with API’s from Spire?

Answer # 3:

Question # 4: Section 1.2.10 – Item A – What version of PeopleSoft is powering Spire?

Answer # 4:

Question # 5: Section 1.2.10 – Item A – How is information being migrated from Spire to Radius? Do you have an existing ETL tool in place? If yes, please provide name and version.

Answer # 5:

Question # 6: Section 1.2.10 – For items A and D, how do they differ in content or purpose?

Answer # 6:
Question # 7: Section 1.2.10 – Are there needs for this integration beyond updating the Lifecycle Stages?

Answer # 7:

Question # 8: Section 1.2.10 – Item E – Are there needs for this integration beyond updating the Lifecycle Stages?

Answer # 8:

Question # 9: Section 1.2.11 – Item B – Would you be looking for CTI integration for advisors or others to make calls connected to Salesforce?

Answer # 9:

Question # 10: Section 1.2.11 – Item C – Would non-degree enrollment processes (paper for in-person, through Spire for Online) be changing as part of the process?

Answer # 10:

Question # 11: Section 1.3.2 – Item E – Explain any needs for data extraction to Tableau and how Tableau and Salesforce will co-exist for reporting.

Answer # 11:

Question # 12: General: Are there key business deadlines for these services which would focus the implementation in phases accordingly to an agreed-upon priority?

Answer # 12:

Question # 13: General: As part of the implementation, what types of organizational changes are being discussed, if any?

Answer # 13:

Question # 14: General: Do you have a detailed list of departments within Isenberg? Can you provide an organizational chart for the College?

Answer # 14:

Question # 15: Is there flexibility in some of the page limitation in the bid response? For example, it will be very difficult to provide a detailed plan in 3-pages as requested in 1.7.1-E.

Answer # 15:
Question # 16: Does the current version of TimeTrade used have a Salesforce Connector, or would UMass be willing to change to a version of TimeTrade that does have the Connector, or consider alternative AppExchange tool for appointment scheduling? Is this integration considered a Phase-1 priority?

Answer # 16:

Question # 17: Similar to prior question, does the current version of LiveChat have the Salesforce Connector?

Answer # 17:

Question # 18: Have you identified what users and use cases will be leveraging Pardot and which will use Marketing Cloud e-Mail?

Answer # 18:

Question # 19: Are event management and e-Mail marketing currently run as part of Hobson’s or separate systems?

Answer # 19:

Question # 20: Can you provide more information on the types of events you support today?

Answer # 20: