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.

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 pm 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: Currently, the plan is to use existing intakes, however we should assume that these will change over time.

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

Answer # 2: No. A query is run daily and the resultant data is imported into the existing CRM system.

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: It is unlikely that Spire will be directly queried by any external system. More likely, our Enterprise Systems team will assist in querying the Spire data and use SalesForce APIs to push the data into the SalesForce system.

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

Answer # 4: We do not anticipate the vendor to directly interface with Spire or the underlying PeopleSoft system. See answer 3 for more info.

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: A text file. Ideally, SalesForce APIs will be used to provision SalesForce. However, using the existing text file for data migration is a fall-back option should the use of SalesForce APIs not be viable.

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

Answer # 6: A & D are similar, but perform different operations. A is the data that is being moved from Spire to the CRM. The first part of D, “Daily automated bulk import from Spire” is redundant to A. However, the lifecycle update currently happens in the CRM after the daily data is imported from Spire.
Question # 7: Section 1.2.10 – Are there needs for this integration beyond updating the Lifecycle Stages?

Answer # 7: The data imported from Spire contains a significant amount of bio/demo data as well as academic program/plan information. Aside from updating the lifecycle stages, the data is used to create targets for the purposes of communication. For instance, we can currently query and email students that are in a particular program/major and have a certain number of credits completed.

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

Answer # 8: The data imported from Spire contains a significant amount of bio/demo data as well as academic program/plan information. Aside from updating the lifecycle stages, the data is used to create targets for the purposes of communication. For instance, we can currently query and email students that are in a particular program/major and have a certain number of credits completed.

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: The data imported from Spire contains a significant amount of bio/demo data as well as academic program/plan information. Aside from updating the lifecycle stages, the data is used to create targets for the purposes of communication. For instance, we can currently query and email students that are in a particular program/major and have a certain number of credits completed.

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: Not immediately. However, the university is considering an enterprise level Salesforce solution which may bring about a change in the admissions processes.

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: Tableau is the schools preferred platform for business visualization. We hope to merge analytics from Salesforce with Google Analytics to create visualizations representing the effectiveness of various programs to attract prospective students. We may use Tableau as well to create dashboards that reflect the effectiveness of communications efforts.

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: We need to have Pardot, Marketing Cloud, and Sales Cloud working and have all of the data from Hobson’s migrated by May 2017, the date our Hobson’s contract ends.
Question # 13: General: As part of the implementation, what types of organizational changes are being discussed, if any?

Answer # 13: We are expecting the consultant to review and recommend changes to staffing and workflows. However, budget and other issues will determine what is possible. We are hoping that our current structure will facilitate all the work that needs to be done.

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

Answer # 14: Yes. A chart listing departments and organization hierarchy will be made available.

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: Yes. There is flexibility.

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: We are open to changing aps and are currently considering other options such as Sumo. It is a priority.

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

Answer # 17: It does. But we are open to alternatives.

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

Answer # 18: Yes. Team members whose focus is prospective students will use Pardot. Team members who manage communications with audiences that are students, faculty, or friends of the school will use Marketing Cloud.

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

Answer # 19: They are part of Hobson’s.

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

Answer # 20: Yes. We support largely recruiting events through Radius.