



UNIVERSITY OF
SOUTH CAROLINA

AMENDMENT NO. 1

TO: ALL VENDORS

FROM: Lana Widener

SUBJECT: USC-RFP-2797-LW
Customer Relationship Management for USC Columbia Campus

DATE: April 28, 2015

This Amendment No. 1 modifies the Request for Proposals only in the manner and to the extent as stated herein.

ITEM ONE: VENDOR QUESTIONS (SEE ATTACHED)

BIDDER SHALL ACKNOWLEDGE RECEIPT OF AMENDMENT NO. 1 IN THE SPACE PROVIDED BELOW AND RETURN IT **WITH THEIR BID RESPONSE**. FAILURE TO DO SO MAY SUBJECT BID TO REJECTION.

Authorized Signature

Firm

Date

VENDOR A

QUESTION #1

How many concurrent users (administrative staff, IT analysts, etc.) should the CRM system be able to handle?

ANSWER

Approximately 150 full- and part-time staff members and other constituents.

QUESTION #2

What is the database type to be accessed by the CRM system? Oracle? SQL? Other?

ANSWER

The CRM system needs to interface with Ellucian's Banner product, which is an Oracle database; refer to Section III, General Information.

QUESTION #3

What is the preferred hosting type for the CRM system? On-premises (i.e. "self-hosted")? Hosted? SaaS?

ANSWER

Web based; refer to Section III, General Information.

QUESTION #4

If a hosted solution is preferred, is the university seeking a 100% cloud-based solution?

ANSWER

Yes.

QUESTION #5

Could the university provide us with a schematic of the network environment into which the CRM system is to be implemented?

ANSWER

Not Available.

QUESTION #6

We understand that the university is currently using a recently implemented EMAS Recruitment Pro CRM system. Are there functional shortcomings to that CRM system that only a new or different CRM system can address or remedy? If so, what are those shortcomings?

ANSWER

The Office at Undergraduate Admissions has been using EMAS Recruitment Pro for the past eight years. Due to an increase in staff size and demands placed on the office, the Office of Undergraduate Admissions is seeking to procure a more robust system.

QUESTION #7

Is the university seeking to replace EMAS Recruitment Pro? If so, why?

ANSWER

Yes, please see above.

QUESTION #8

Which departments would be using the newly procured CRM system?

ANSWER

Office of Undergraduate Admissions

QUESTION #9

Would the implementation involve multiple campuses? If so, which campuses?

ANSWER

At this time, the implementation involves solely Columbia Undergraduate Admissions and approved campus constituents.

VENDOR B

QUESTION #1

May operational manuals be submitted electronically regarding the Operational Manuals section on page 10 of the Request for Proposal (RFP)?

ANSWER

Yes.

QUESTION #2

Approximately how many pieces of communication are print and how many are electronic from the 1M+ described in the Volume section on page 10?

ANSWER

Approximately 50% are print, and 50% are electronic.

QUESTION #3

Is the ability to rate leads desired for this system?

ANSWER

Yes.

QUESTION #4

Is there a phone system that will need to be integrated with the CRM solution for University staff that will be calling potential students and various constituents?

ANSWER

USC is receptive to solutions that allow for this capability.

QUESTION #5

Does the University currently use a marketing automation tool? (i.e. Eloqua, Marketo, Act-On, etc.)

ANSWER

No.

QUESTION #6

What are the University's current application and yield rates?

ANSWER

In 2014, USC's Undergraduate Admissions received more than 32,000 applications. USC's yield rate was approximately 42% across all applicant types.

QUESTION #7

Does the University currently use an analytics package to analyze the effectiveness and return on investment (ROI) of campaigns, events, etc.?

ANSWER

Undergraduate Admissions does not currently use a single analytics package. A variety of reports are used.

QUESTION #8

Does the University have a preferred analytics package they would like to use for this CRM solution?

ANSWER

No.

QUESTION #9

Will the University consider a custom solution for this RFP?

ANSWER

Yes.

QUESTION #10

Will the University consider a cloud based solution for this project?

ANSWER

Yes.

QUESTION #11

How many internal users will be needing system access?

ANSWER

150 full- and part-time staff members and other constituents.

QUESTION #11 a.

Have profiles and roles been considered for security set-up/record access/functional ability in system? (i.e. Marketing role that will only work with campaigns, recruiters that will work with applications and event registration)

ANSWER

Yes.

QUESTION #12

Does the University envision the recruiters being able to submit an application on behalf of a student (capture student's electronic signature)?

ANSWER

No

QUESTION #13

Does the University envision a self service web application for students?

ANSWER

Yes, refer to Section III, General Information, Part E.

QUESTION #14

Will you be using any reference data to maintain data quality (i.e. D&B, data.com, etc.)

ANSWER

Not at this time.

QUESTION #15

Does the University currently utilize a de-duplication tool for (leads/students)?

ANSWER

Yes, USC's current CRM has an existing tool.

QUESTION #16

Will the University entertain responses to the RFP from vendors who would conduct the majority of development work remotely?

ANSWER

Yes.

QUESTION #17

Do you have business process flow diagrams?

ANSWER

No.

QUESTION #17 a.

If so, can you please share them?

ANSWER

None available.

QUESTION #18

Does the University have an approved budget for this project?

ANSWER

It is not available.

QUESTION #18 a.

If so, can you please share what the budget is?

ANSWER

Refer to answer to Question 18.

QUESTION #19

What gaps are you seeing between your processes today that you are looking to improve with a CRM system?

ANSWER

Improved workflow, communication management, improved reporting and analysis.

QUESTION #20

Do email templates need to be created? If so, approximately how many?

ANSWER

Yes. Fifteen to twenty templates that can be used for a larger number of e-mails.

QUESTION #21

What languages does the solution need to support?

ANSWER

English.

QUESTION #22

How many users will be accessing this portal?

ANSWER**USC requested clarification****Vendor response:**

The question is referring to the Functional Requirements Section, A. General- They system #3 which is on page 11 of the RFP document.

USC's response:

USC does not have an existing portal for incoming students. USC would estimate that approximately 250K annual users for all levels of prospects may use a portal through the CRM.

QUESTION #23

Does the university use a current 'Online Chat' program that they will want to integrate with the CRM solution?

ANSWER

Yes, LiveChat Inc.

QUESTION #24

Does the university currently use a text messaging tool or platform?

ANSWER

No.

QUESTION #25

What 3rd party address verification and cleaning services does the University use are these the Universities preferred systems for this solution?

ANSWER

USC Undergraduate Admissions currently uses Clean Address as part of our Ellucian Banner instance for applicants. Address cleaning for prospects is desirable, and USC would like to know if the proposed CRM solution addresses this either within the CRM itself or through an additional subscription through a third party provider such as Clean Address.

QUESTION #26

Is the University of South Carolina currently utilizing Clean Address for address validation or Common Matching rules in Banner for duplicate checking?

ANSWER

Yes, both are used.

QUESTION #27

Is the University of South Carolina utilizing Self-Service Banner to allow prospective students to apply?

ANSWER

The Office of Undergraduate Admissions in Columbia is not.

QUESTION #28

Is the University of South Carolina looking to replace its existing online application?

ANSWER

The University is willing to consider application tools from one or more sources.

QUESTION #29

Can you provide more information, and perhaps a use case for req17 from the Back Office Functional Requirements Section?

ANSWER

Data archival may occur in order to provide a data set that can be used for research purposes.

QUESTION

"Must provide capability for data archival". Does the University archive old prospect data?

ANSWER

Yes. It may be used for research purposes.