



November 9, 2021

ADDENDUM NO.: Two

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# CMJ-1118**  
Dated: October 1, 2021  
Commodity: Customer Relationship Management System  
RFP Closing On: November 16, 2021 at 2:00pm Est.

Please note the clarifications and/or changes made on this proposal program:

- 1) **Question: Service Group 1 is focused on capabilities, but not a specific functional area as is the case with Service Groups 2-4. However, there is still a request for implementation pricing for Service Group 1 in the Pricing Section. Is this in error? if not, can you provide the details of what group will be using the defined functionality outlined in Service Group 1 for which you would like implementation pricing?**  
Answer: The capabilities and system attributes outlined in Service Group 1 represent two main functional areas in JMU's CRM implementation, the platform itself, and an aggregation of shared needs that span the University and Service Groups. JMU expects offerors to provide pricing Section X. Pricing Schedule for implementing the platform itself and preparing it for the components outlined in Service Groups 2-4 (data structure, core integrations, authentication, and application security).
- 2) **Question: We understand the goal is to purchase the same technology platform across Service Groups 2-4. How important is it to the team to also use the same implementation partner across all those service groups?**  
Answer: JMU is open to using multiple implementation partners based on their area of subject matter expertise.
- 3) **Question: Given the variables on the level of effort for the implementation services based on the confirmed scope of the project, is a range for the cost suitable at this stage, to be confirmed after discovery**  
Answer: A cost range is suitable at this stage. JMU requests that factors that drive the cost variations be outlined.
- 4) **Question: We understand you will be forming internal CRM implementation project teams to fit the requirements of the project. Can you tell us more about your program management team? Will there be someone overseeing the CRM project as a whole as well as the individual CRM work streams?**  
Answer: JMU does have program/project management and business analysis resources that will be involved with the implementation. Governance will include a Steering Committee and program/project management. We anticipate multiple work streams that will each include project management and business analysis resources.
- 5) **Question: In an effort to tailor our estimate to meet your specific needs and not duplicate work that may have already been completed, does JMU have a multi-year plan for this project? If so, what milestones have been identified? Is JMU interested in a strategy engagement to determine high-level requirements and a long term roadmap?**  
Answer: See response to question 16 on Addendum one which states *"There is no set timeline for award of this RFP or go-live of any selected system(s). From an implementation sequence standpoint, the focus will be on Advancement and Advising first with Admissions coming afterwards. JMU is open to recommendations on phasing within these two initial areas from offerors."*

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6) **Question: Call Center - Does the call center need to have capabilities to handle inbound calls? If yes, could you please specify:**

- a. **count of published numbers (DID, Toll-free),**
- b. **List of languages to be supported,**
- c. **Can you share the count of call flows and a high-level description of the intent or reason, and if you have any flow diagram for each flow? Please provide**
- d. **Count of recipient groups (unique skill groups)**

Answer: Undergraduate Admissions does not need inbound calls. Advancement: Yes.

- a. Advancement: One primary, and during the annual day of giving one more is added.
- b. Advancement: English.
- c. Advancement: Each representative can handle the entirety of the call. Sometimes, managers will be brought on the call to answer questions but there are no transfers.
- d. Advancement: One.

7) **Question: Call Center - Does JMU need the functionality to handle inbound Text & Emails? If yes, please specify the:**

- a. **count of distinct text numbers, emails IDs, and recipient groups**
- b. **Can you share the count of email flows and a high-level description of the intent or reason, and if you have any flow diagram for each flow? Please provide**
- c. **Please share the Integration with systems required**

Answer: Within the context of call center, Undergraduate Admissions does not need inbound text or email.

Advancement: Yes.

- a. Advancement: 80k total contacts for calling, texting and email. We don't currently handle inbound emails, but it would be nice to have.
- b. Advancement: Email is usually one way stewardship touch with no response required though sometimes prospect do.
- c. Advancement: Anticipated integrations include Mongoose and ThankView. Integration with university email (currently iModules/Anthology) platform may be necessary depending on native email marketing feature set in the platform.

8) **Question: Call Center - How many persons would be engaged in:**

- a. **Receiving inbound calls. How many maximum persons would be logged in simultaneously to manage inbound calls?**
- b. **Making outbound calls. How many maximum persons would be logged in simultaneously to manage outbound calls?**
- c. **Managing Chat &Text. How many maximum persons would be logged in simultaneously to manage Chat & Text messages?**
- d. **Managing Emails. How many maximum persons would be logged in simultaneously to manage emails?**
- e. **Supervising**
- f. **Administrating (monitor, access reports)**
- g. **Is there any automated dialer required for making outgoing calls?**

Answer:

- a. UG Admissions: None.  
Advancement: 6.
- b. UG Admissions: 25-30 max.  
Advancement: 12.
- c. UG Admissions: 25-30 max.  
Advancement: 12.
- d. UG Admissions: 25-30 max.  
Advancement: 1.
- e. UG Admissions: we currently have 4 Telecenter supervisors.  
Advancement: 2.

- f. UG Admissions: we currently have 2 Telecenter administrators.  
Advancement: 4.
  - g. UG Admissions: An automated dialer is not needed or currently used.  
Advancement: Automated dialing is strongly preferred.
- 9) **Question: Call Center - Would the outbound calls be made to international locations? If yes, could you please share the list of Countries?**  
Answer:  
UG Admissions: No.  
Advancement: The capability is desired, but JMU doesn't currently have this ability.
- 10) **Question: Call Center - Would you need a recording of voice calls and screen share? If yes, What should be the retention period for Voice and Screen separately?**  
Answer: UG Admissions: No.  
Advancement: Yes, but only if it can be on-demand and not persistent (to avoid prospects having to consent). For the voice, the retention period would be indefinitely for training purposes, screen recording could be as frequent as monthly.
- 11) **Question: Call Center #107. d. - Do you wish to provide voice confirmation as a receipt, or do you need to send out an email with an attachment or any other modes to provide a receipt?**  
Answer:  
UG Admissions: No.  
Advancement: Receipting via email.
- 12) **Question: Call Center #107. e. - Would you please define entities (is it the caller or dept within JMU)? Do you need functionality to pay/receive money via specific wallets associated via phone or capability on IVR to send/receive money? Could you kindly elaborate on all payment options the caller would have?**  
Answer: Entities refer to the prospects i.e the individuals we are calling or receiving a call from. Via phone, we are concerned with payment card transactions only. Other options would include sending out a follow up email or text with a giving link to the prospect. In such a case, the prospect should be able to pay with digital wallet or PayPal as well.
- 13) **Question: Chat - Kindly list channels a chat would be initiated from, E.g., Web, Mobile app**  
Answer: JMU would like the offeror to provide all available channels the product supports for JMU's consideration.
- 14) **Question: Chat #109 - Could you share a list of use cases that you need AI-driven chatbots to handle?**  
Answer: JMU sees opportunities for using AI driven chatbots across the University in different areas to respond to Frequently Asked Questions, and to use as a triage tool, escalating users to a live chat feature after attempting to resolve their issue or answer their question using the chatbot first.
- 15) **Question: General - Does JMU expect the offerors to fill in responses only in the shared RFP Doc format "CMJ-1118-CRM RFP" or a separate document filled with responses to the 4 Service Groups? Please confirm. The offeror's final response would be mailed to the university with SEALED PROPOSALS as requested in the RFP**  
Answer: The RFP is provided in Word to be a working document filled in with offerors' responses. Offerors may send additional information, as needed, with their proposal as appendices.
- 16) **Question: How many CRM users are anticipated within the three admissions offices?**  
Answer: See CMJ-1118 Addendum One, answer to question #101.
- 17) **Question: How many applicant reviews are involved with R&A?**  
Answer: Not available. Information may be made available to top offerors in negotiations.

18) **Question: How many students are actively being advised during any given school year?**

Answer: All students.

19) **Question: If you were to guess, how many times a semester does a student engage with an advisor?**

Answer: The number can vary between departments and programs. See CMJ-1118 Addendum One, answer to question #65a for additional details on JMU's Advising model.

20) **Question: What is JMU's ideal goal for retention ROI for a new system? For example, JMU would like to see a +5% in retention by 2024.**

Answer: Not available. Information will be made available post award.

21) **Question: General - Can you provide an estimated number of users for each of the following departments:**

- a. **Service Group 1 (IT staff and others involved in administering the solution, not included in the groups below)**
- b. **Service Group 2 (Advancement Staff)**
- c. **Service Group 3 (Advisors, including professional and faculty)**
  - i. **Full Time Advisors**
  - ii. **Part Time Advisors**
- d. **Service Group 4 (Admissions Staff)**
  - i. **Admission Recruiters / Counselors**
  - ii. **Application Reviewers (not included above)**
  - iii. **Other admissions staff (back office, IT)**
  - iv. **Student Workers**

Answer:

- a. There will be a small number of users in Service Group 1 initially (relative to the other Service Groups), but we expect this number to grow over time.
- b. See CMJ-1118 Addendum One, answer to question(s) #78.
- c. Full Time Advisors: ~55, Part Time Advisors ~300.
- d. See CMJ-1118 Addendum One, answer to question(s) # 101, #107c further breakdown not available.

22) **Question: Service Group 4 - Admissions (Undergraduate, Graduate and Continuing Education)**

- a. **Is there a requirement for interview scheduling?**
- b. **How are new prospective names transferred to JMyou? Flat file?**
- c. **Are first-year, transfer, and international applicants managed through the same processes?**
- d. **Are there any specialty programs (Pre-college, dual enrollment, visiting/exchange, non-degree?**
- e. **What prospect sources should be considered for this project? Purchased lists, etc.?**
- f. **How are graduate services distributed? By academic unit? By school?**

Answer:

- a. UG: Not currently.  
Graduate: Currently we do not have this functionality, but it is desirable, many individual programs conduct interviews as part of their admission processes and they need to manage this outside of the primary system.  
SPCE: No.
- b. UG: Between 75,000 and 150,000. This year we are at 98,000.
- c. UG: No, it is not the same, but the processes are very similar.
- d. See CMJ-1118 Addendum One, answer to question(s) #107d.
- e. UG: Purchased names, campus visitors, volunteered information (info requests, email requests, phoned in requests, JMyou joiners), college fairs, non-admissions on campus events.  
Graduate School: Prospects are entered into the CRM from a few sources:
  - i. Web-based "request information" forms that appear on multiple web pages. We can't currently do this but the new system should be able to customize these forms for each page, so, for example, we know the student is interested in a particular program because they are completing the request information form on the page that describes a particular program.

- ii. Lists uploaded by staff members that include people who inquire by e-mail or phone, individuals who add their names to physical lists during events, individuals who sign up for Zoom information sessions about programs, and inquiries that come through directory websites to whom we subscribe.
- iii. Lists that we acquire that are entered as “suspects.” These individuals that we acquire for free (McNair Scholars, National Name Exchange, Grad Fair Participants) or that we pay for. They are entered as “suspects” and not prospects because they have not expressed an interest in receiving information from JMU. If they respond to these messages with an expression of interest, we need to be able to convert these individuals from suspects to prospects.

SPCE: We currently are not purchasing lists to market our programs. Most prospect sources would be leveraged through digital marketing with specific mediums (LinkedIn, Google, Bing, Instagram, Facebook, etc.) determined by the target audience and budget.

- f. Graduate School: Services for the graduate school are primarily organized by either program or concentration within a program. This varies by program depending on the entity to which the student applies. In some cases, students apply to the program, and if there is more than one concentration, they select the concentration within the application for the program. In other cases, students apply to the concentration and there are separate application pools for each concentration.

Signify receipt of this addendum by initialing “Addendum #2\_\_\_\_\_” on the signature page of your proposal.

Sincerely,



Colleen Johnson

Buyer Senior

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