

**RFP #GSU23-001 CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM
ADDENDUM #3 – Q&A**

Glennville State University extends its thanks to the vendors who have shown an interest in our CRM project and submitted questions. Below is a list of answers to the questions we received. Duplicate questions have been eliminated.

- 1. Regarding - 3.3.13 Web Design: Must meet all disability requirements and meet all Glennville State skinning and branding requirements. - What are the university's skinning and branding requirement that our product is expected to meet?**

Please use this [link](#) to view Glennville State University's style guide

- 2. Regarding - 3.4.2 Connectivity: System should interact with university email and texting solutions, and connect to common social media platforms. - What are the university's email and texting solutions?**

GSU utilizes Office 365 for email and Mongoose for texting.

- 3. Regarding 3.6.1 "Product should allow for login through Glennville State's account authentication." - What is Glennville State's authentication provider?**

GSU's authentication provider is Active Directory

- 4. Regarding 3.6.2 "Product should allow for bi-directional data exchange with Banner and Degree Works."**

- a. What data does Glennville State admissions wish to send to Banner, and what would admissions like to receive back from Banner?**

Once students have submitted a FAFSA, high school transcripts, test scores, or other new student documentation, various GSU offices enter that information into Banner. For the purpose of creating communication segments to new students on their next steps, the Office of Admissions will need to be able to pull pertinent information from a CRM, which should include things that have been updated in Banner. Examples include date of birth, phone number, social security number, address, and degree program changes which will require a fluid data exchange between banner and the CRM.

- b. Please describe the use of Degree Works at Glennville State and what information admissions would like transferred between their department and this system.**

From an Admissions perspective, our office provides more of a one-stop-shop approach to the onboarding of new students. This population includes re-admitted students, transfers, and Dual enrollment students who all come in with previous

college coursework. The main objective when approaching these students is checking the status of their transcripts so our Registrar's office can post the credits and we can then register the students. With the onboarding of a CRM, our office would like to cut down on the platforms in which we will need to search for student information.

- 5. Regarding 3.7.7 “The submission of multiple applications, or limiting to a single application, based on configuration.” - Please describe a situation where multiple applications would be accepted or required for an applicant.**

Glennville State University has a robust Dual Enrollment program in which students are able to take college coursework while still in high school. Students in this program often apply for general admission to the university while also having their student application in Banner. Another example is students who are nearing graduation from an undergraduate GSU program and complete a separate application to the graduate program. GSU is continually expanding programs, growing enrollment, and creating concentrations, specifically in the health field, that will require an additional application process for admission into program specific departments.

- 6. How many full users (able to configure the system, update settings/workflows, write reports, use live chat, own cases) do you anticipate will access the solution?**

For our office of admissions, we would request a minimum of 10 full users - that would include 6 or 7 counselors, the Director of Admissions and VP of Admissions. We also believe that there may be opportunities for the office of off-campus programming to utilize this functionality, which would entail 1-3 additional users.

- 7. How many light users (create and update contacts, run/ view pre-written reports, manage communication and events) do you anticipate will access the solution?**

We would request roughly 15-20 "light users" including the admissions office Administrative Assistant, their group of student workers, and the academic success team.

- 8. Are you interested in implementing a live chat feature between staff and students? If so, how many live chat users from your staff do you anticipate will access the solution?**

Yes. Assuming “live chat” refers to texting solutions, we would have a very broad need for live chat with prospective and existing students. In addition to the admissions office, this function would be helpful for financial aid, the business office, the registrar’s office, academic success, off-campus programming, and academic affairs. The exact number of users will be determined upon contract award.

- 9. Are you interested in non-live chatbot? This chatbot performs multiple tasks, saving staff time and going well beyond simple questions and answers. This assistant answers questions and can route the conversation to a live person if needed and create follow-up help tickets.**

We would be interested in seeing if this function is included in the general functioning of the CRM or is an add on feature. Per the RFP, we would like to see the option for add-ons such as these and the associated costs.

- 10. Do you have any flexibility with your anticipated go-live date of June 2023?**

The goal is to be able to utilize the new CRM before the inception of the fall term in August. The June date also coincides with the end of the contract we have in place with our current management organization. Anything beyond June would be more difficult to navigate and therefore is not preferable.

- 11. Is SSO for staff members or is it required for active students? If so, what authentication service is used / required?**

SSO is used by staff and students for certain applications. Active Directory is the authentication service used.

- 12. Do you have staff members trained in using Power BI as System Admin / Business Analyst (building reports, connecting with data sources, etc.)?**

No.

- 13. Is file-based batch integration with Banner acceptable?**

File-based batch integration with BANNER is only possible with WVNET-approved connections.

- 14. Is file-based batch integration with DegreeWorks acceptable?**

File-based batch integration with BANNER is only possible with WVNET-approved connections.

- 15. Does the University have a dedicated marketing team? Does the University have defined communication content (verbiage, videos, pictures,) or will it require assistance from the awarded vendor?**

GSU does currently have a dedicated marketing team. We do have a defined content available (photos, logos, video, etc.) and would want to make sure what was used for the CRM matched the rest of our content.

16. Do you have a change management plan already in place? Will you be seeking change management services as part of this RFP?

No.

17. What are you envisioning for project team staffing?

Our desire is for the CRM to be managed by the admissions office without a dedicated CRM administrator. That said, our Director of Admissions will have to oversee those responsibilities and will need a point of contact that is readily available.

- a. Will this be work on top of their day-to-day responsibilities? - No
- b. Will they temporary backfilled? - No
- c. Will you have a dedicated Project Manager assigned? - No
- d. Will you have a dedicated CRM Administrator for this project? If so, is this an IT resource or functional area resource? - No

18. Do you intend for the awarded vendor to teach you how to configure for you and the vendor to share the configuration? Or, do you expect the awarded vendor to do all configuration?

The awarded vendor should do all configuration.

19. What is your current payment gateway provider?

The West Virginia State Auditor's Office is the current payment gateway provider.

20. Does the University have a list of preferred CRM systems that they have looked into?

The University does not have a list of preferred CRM systems. All vendors who submit a proposal will be considered equally.

21. How many students typically funnel through the recruitment process?

We have several tiers of students who flow through the recruitment funnel including prospects, interests, and applicants. Last year our interest and prospects were around 5,000. This is largely due to our name buying strategies, which we have reduced this year significantly. Our applications are around 1,500 for the fall terms.

22. Does the University need a student-facing portal?

The office of Admissions would like to be able to have a student portal where students are able to check their admissions status and have a checklist for admission to follow.