Montgomery County Community College

Request for Information #09-012315RFI-01

Customer Relationship Management System

January 5, 2015

To: All Interested Vendors

Re: Request for Information

Montgomery County Community College is requesting information regarding an enterprise Customer Relationship Management system to be used in the recruitment and retention of students. Montgomery County Community College invites all interested vendors to submit a response to this RFI.

Requests for Information are being sought strictly for the purposes of gaining knowledge of vendors, systems, and services available and the respective cost estimates. This process should not be construed as intent, commitment, or promise to acquire services or products. No contract will result from any response to this RFI. Although not guaranteed, it is the intent of Montgomery County Community College to use the information from this RFI process to develop specifications for a Request for Proposal process at a later date. The College’s information gathering process may include subsequent requests for web-delivered product demonstrations.

Responses to this RFI must be submitted to the following address no later than 2:00 PM, January 23, 2015. Five printed copies and one electronic copy of all responses are required.

Questions relative to this process should be directed to purchasing@mc3.edu. All questions must be received no later than 2:00 PM on January 9, 2015.

Thank you for your interest in this process.

Procurement Office
Montgomery County Community College
340 DeKalb Pike
Blue Bell, PA 19512
Montgomery County Community College

Request for Information

Customer Relationship Management System

1. Project Purpose

Montgomery County Community College is seeking information on Customer Relationship Management (CRM) systems designed for use in institutions of higher education. The ability of such a system to improve the following outcomes is being considered.

- Improve effectiveness of student recruitment initiatives.
- Increase retention of students through more personalized and directed communications; utilizing modes of communications preferred by individual students.
- Automate the admissions process, permitting a perspective student to transition to a student in a seamless manner.
- Increase response to College Advancement efforts.
- Improve effectiveness of all marketing and communications; utilizing multiple modes of communications, including social-media, text messaging, etc.
- Provide efficiencies in the management of all modes of constituent touchpoints.
- Integrate automated, personalized communications in key transactional processes.
- Integrate communications in automated, targeted customer satisfaction surveys.
- Integrate responses to communications in student early alert and analytical processes.

2. Requested Information

Please be sure that your response includes, but is not limited to, the following information items.

Company Details

a. Overview of company history in the implementation of CRM within the higher education market.
b. Size and composition of higher education customer base.
c. 36 month higher education customer sales history (in quantity per month, not specific institutions).
d. Plans for future product development and enhancements relative to use within a higher education setting.
e. Examples of other uses of your product within the higher education market; including metrics that demonstrate effectiveness, if available.

Solution Details

a. Please explain if your proposal is an end-to-end CRM solution (prospect student through alumni) or if it provides a portion of this relationship (e.g., prospect, applicant, student, etc.) If the later, please explain those with whom you partner to manage the communications through the remaining stages of engagement.
b. Explanation of the components of the system (hardware and software).
c. Explanation of product software modules, features, functionality, and cost for each.
d. Description of relationships and reliance with 3rd-party vendors and partnerships.
e. Explanation of how your system reduces the occurrence of duplicate records.
a. Detailed explanation of the integration, if any, of your product and alternate modes of communications such as social media, SMS/text messaging, and mobile applications.
f. Description of system security, FERPA compliance, and access control.
g. Detailed description (including graphics or links to video demonstrations) of the user interface of the product.
h. Detailed description (including graphics or links to video demonstrations) of the process necessary to establish communications rules or workflows.
i. Explanation of standard reports as well as the ability to customize reporting.
j. Detailed description of project management and implementation support.
k. Detailed description of ongoing customer service options.
l. Detailed description of customer training recommended for each module or facet of communication.
m. Detailed description of customer implementation team staffing requirements typical to implementation of your solution in higher education.
n. Description of the product update process. If a hosted solution, how are users informed of updates?
o. Description of ongoing staffing requirements necessary to maintain your system in an organization sized similarly to MCCC while accomplishing the project goals stated above.

**Integrations**

a. MCCC is considering integration with the following existing and new systems. Please explain the following for each integration:

- The potential to integrate with these systems and the functionality of the resulting integration.
- The maturity of the integration; will it require custom development or has it existed?
- The architecture of the integration; is it real-time or a batch process?
- Any MCCC staff resources (both IT staff and other) or custom development necessary to support the integration.
- A budgetary estimate of the potential additional costs associated with each integration.
- The addition to the project timeline with each integration.
- Prior experience with such integrations.

a. **Existing**
   
   i. Ellucian Colleague Student
   
   ii. Ellucian Colleague Finance
   
   iii. Ellucian Portal / Microsoft SharePoint 2013
   
   iv. Microsoft Office 365 – Exchange email
   
   v. Ellucian Colleague Reporting and Analytics
   
   vi. Blackboard Analytics for Student
   
   vii. Perceptive Software ImageNow
   
   viii. Siemens HiPath 4000 telephone system and Siemens HiPath Pro Center contact center system (so as to capture a lead based on calling party ID, or to reference prior contact with a student based on calling party ID).

b. **New** (Please list all existing integrations with the following types of systems.)

   i. Email Marketing Systems (e.g., Vertical Response or Constant Contact)
   
   ii. Event management systems
   
   iii. e-commerce Systems
   
   iv. Web Content Management Systems (so as to record visitor navigation College website or to initiate a communications to a returning potential student).
   
   v. Enterprise survey / customer feedback systems (e.g., Qualtrics).
   
   vi. Media and/or social media monitoring system

b. Please explain integration with existing systems that manage automated communications to students. For instance, the College will continue to utilize the Starfish Retention System which automates email and text communications to students. Is it possible to record this communication within the CRM system so that staff will have one source to review all correspondence with a student?
Implementation and Operational Resources / Managed Services

a. Through this RFI process, MCCC is attempting to realize the staffing resources necessary to implement the completed CRM system. In addition, it is critical to understand the ongoing staffing resources necessary to effectively maintain and operate the CRM system going forward. For the base configuration and all add-on modules or integrations, please provide the recommended MCCC staff necessary to ensure a successful implementation and ongoing operation of the CRM system.

b. As an alternative to in-house management of the CRM system, please provide options for additional implementation and operational services that will reduce the MCCC staff necessary to successfully operate the CRM system. Please explain the detailed roles and responsibilities of such resources, the associated costs, and the reduction of MCCC staff necessary to implement and maintain the system.

Miscellaneous

Please also include the following in your response:

a. Examples of past experience providing similar services clients (higher education institutions preferred, corporate examples are acceptable) similar to Montgomery County Community College. Please also include the implementation duration for each example and the amount of dedicated FTE resources provided by the institution to implement and support the solution. Please list the systems and services provided in these projects.

b. Names of other community college customers.

c. A list of risks common to the implementation of CRM solutions within a higher education institution. Please also provide mitigation suggestions relative to each.

d. A list of common mistakes made during the implementation of CRM solutions within a higher education institution.

e. A spreadsheet outlining itemized cost estimates for each license, service, ongoing / annual maintenance costs, or other costs associated with the full implementation of your solutions.

f. Estimated project plan for solution implementation that includes target milestones and task durations. Please include estimates MCCC staffing (both IT and other) requirements for each milestone.