REQUEST FOR PROPOSALS #2021-012
Customer Relationship Management Solution
RESPONSE ADDENDUM #3
February 11, 2021

CLARIFICATIONS

1. RFP Section 1.3.1 – Response to Written Questions - Remaining responses noted herein.

2. Deadline for Proposal Submission is modified to **February 28, 2021 by 11:59 p.m. EST**

Key data points requested in the questions below:

CAMPUS	#CRM Users	#CRM Users (part time)	#CRM Users (Reviewing Apps)	#CRM Users (Admissions Counselor)	#CRM Users Admin & Power Users (Full Access)	#CRM Users Admin & Power Users (Mass Comm Access)	#CRM Users (Sys Admin)	#CRM Faculty Users (System Admin)	#CRM Faculty Users (Mass Comm)	#CRM Users (Chat)	#CRM Users (Limit Access)	#CRM Users (Mkting)
Question	1.6,35	2	3, 5, 10	9	4	4	13	5	5	8	7,14	11,12
UM	115	50	0	13	4	4	4	0	0	0	111	3
UM Grad	19	0	70	13	11	6	2	0	70	0	70	6
UMA	25(3 not in use)	0	0	11	8	0	2	0	0	0	0	0
UMF	25	1	0	6	8	0	3	0	0	0	1	4
UMF Grad	5	1	2	1	1	2	1	0	0	5	1	2
UMFK	6.5		5	4	1	2	1	0	0	0	6	2
UMM	10	0	0	1	10	10	10	0	0	0	0	10
UMPI	5.5		4	3	1	2	1	0	0	0	10	2
USM	46	0	18	18	4	4	2	0	5	0	8	4

CAMPUS	Inquiry Volume	Application Volume	#CRM Users (Event Reg)	Unique Email Addresses	#CRM Users with BI Need	Territory Mgmt (admissions counselors and first line managers)	total # of leads/ contacts	Total Emails Sent Annually	Total Constituents Mkt Annually
Question	15	16,19,20,22,24	17	18	25	21	23	26,32	27
UM	35,000	16,000	5	250,000	2	13	1.3M	2M	250,000
UM Grad	3,800	2,700	5	41,500	3	5	100,000	240k	60,000
UMA	4,000	2,700	1	25,000	2+	1	66,000	250k	35,000
UMF	4,000	2,000	3	80,000	0	6	384,000	1.2M	85,000
UMF Grad	150	45	2	800	n/a	0	800	5k	800
UMFK	2,750	1300	3	5,750	n/a	4	5,750	76k	5750
UMM	5,000	1,000	10	26,000	n/a	1	132,000	100k	26,000
UMPI	2,350	1,300	3	26,300	n/a	3	26,300	210k	26,300
USM	20,500	8,400	3	40,000	6	18	675,000		40,000

CAMPUS	# Advisors	approximate ratio of	#Students FTE	Data Migration Volume	Facilities & Maintenance Staff	#Text Messages

		students to advisors				
Question	28,34	29	30	31	33	36
UM	n/a	n/a	7,847	tbd	n/a	100k
UM Grad	n/a	n/a	2,400	tbd	n/a	10,000
UMA	n/a	n/a	4,041	tbd	n/a	10,000
UMF	n/a	n/a	1750	tbd	n/a	12,400
UMF Grad	n/a	n/a	200	tbd	n/a	0
UMFK	n/a	n/a	1,100	tbd	n/a	2,300
UMM	n/a	n/a	480	tbd	n/a	1,000
UMPI	n/a	n/a	1,400	tbd	n/a	3,100
USM	24	1/200	6,122	tbd	n/a	35,000

DATA REQUESTS

1. How many users will be using the new CRM? Users being internal (employees, staff, faculty, etc). Please specify the quantity for each campus if possible.

2. How many of the total users are part-time employees? Please specify by campus if possible

3. Are there any users who will strictly be reviewing applications? If so, how many of this type of user will there be? Please provide a breakdown of users by individual institution.

4. How many total users will be admins/power users who may need full system access and/or mass communication access (e.g. sending email to more than 200 individuals at once)?

5. How many users will be basic/end users, application reviewers, and faculty who do not need system configuration or mass communication access?

6. How many full access users (able to configure the system, update settings/workflows, create and manage campaigns/communication plans, use live chat, write reports, other higher level functions) do you anticipate will access the solution?

7. How many limited access users (only able to update contact data fields, add notes, and run pre-written reports) do you anticipate will access the solution?

8. Do you expect to use the chat feature? If so, how many chat users do you anticipate will access the solution?

9. Please indicate how many users at each institution would be interfacing with prospective students directly (front line workers like admissions counselors)?

10. How many users are 'application reviewers'? Please specify per campus.

11. How many users do you anticipate will need access to marketing automation functionality? Please specify for each Campus if possible.

12. Are your marketing teams Centralized, or does each campus have separate marketing teams that will access the system?
    - How many end users will be in the Marketing Platform?
    - Can you please describe the roles of the marketing users? For example, marketing manager, graphic designer, etc.

13. How many users will be system administrators? Please provide a breakdown by individual institution.

14. Will some users only need limited functionality? If so, how many of these types of users will there be and what types of tasks will they need to accomplish? Some examples would be faculty members who strictly review applications for admission, student workers who strictly use the system to enter inquiries or make phone calls, etc

15. What is the System's annual inquiry volume? Please breakdown by university/institution.

16. What is the System's annual application volume? Please breakdown by university/institution

17. How many users will be involved in creating events and event registration pages with the new CRM system? Please provide a breakdown of users by individual institution.

18. Approximately how many unique email addresses (contacts) does the University of Maine System include in email marketing campaigns annually? We are mainly looking for the total number of individual email addresses that will be receiving emails from the communication system throughout the year, not the total number of emails sent. Please include a breakdown for each individual institution.

19. How many total applications does the University of Maine System receive annually? Please provide a breakdown for each institution.

20. Share the annual application volume for each of the six campuses, then we would be able to provide pricing in our response. For the purposes of determining the pricing tier, we look at the total number of submitted applications, both complete and incomplete, but not applications that are started and not submitted. We look forward to submitting our response to your RFP

21. How many admissions counselors and first line managers involved in territory management are there? Please specify per campus.

22. How many applications are received on an annual basis? Please specify per campus.

23. What is your current database size (total number of leads/contacts in your system)?

24. What is the volume of applications and applicants per year?

25. How many people (managers and executives) within the UMS would you like the ability to leverage Business Intelligence (BI) / Artificial Intelligence (AI) to explore admissions data?

26. How many emails does the admissions department send to constituents per year? (Ex: 10M annually or 1M monthly) Please specify for each Campus if possible

27. To how many constituents annually does each institution market? Please specify per campus.

28. How many student advisors are there at UMS? Please specific by campus

29. What the is approximate ratio of students to advisors?

30. How many current students are there within UMS? Please specify per institution

31. What historical records and record volume will need to be migrated?.

32. What is the estimated email send volume by campus?

33. How many Facilities & Maintenance Staff are there at UMS? Please specify per campus.

34. How many student advisors are there at UMS? Please specific by campus.

35. What are the number of users from each campus slated to use the unified CRM?

36. How many text messages and push notifications does the department send to constituents per year? Please specify for each Campus if possible.