****

**Automated Marketing Software (“AMS”)**

**RFP No. 221003**

**Q&A Addendum #2**

Thank you for your interest in the University of Arkansas Grantham RFP No. 221003, Automated Marketing Software (“AMS”). Below you will find vendor questions and our responses.

1. Section 14, Question 8.5 – Can you clarify what specific functionality offered as part of the automation system?

To the extent that the proposed solution incorporates CRM capabilities/functionality (in addition to marketing automation) response should describe those CRM capabilities.

Section 14, Question 8.6 – How is the telephony integration set up today? What is your desired outcome for telephony integration?

Telephony is integrated with the CRM.  Responses should address feasibility of integrating the current system (Genesys - PureConnect) or an equivalent solution to the proposed marketing automation solution.

Section 14, Question 8.7 – What is your desired outcome for auto-dialer software integration?

The complete range of automated dialer best practices.

Section 14, Question 9.1 – What reporting metrics from Google & Facebook to identify the cost of marketing are required? Does this include Facebook Ads & Google Ads?

Response should include whether and to what extent Google Ads and Facebook advertising metrics can be appended to visits and leads.

 Section 14, Question 10.3 – What social media management tools/platform are you using or considering?

Salesforce Social Studio; open to other solutions used to schedule, deploy, and monitor social organic communications.

1. What channels do you use currently send through your digital marketing platform?
	1. Email
	2. SMS

Yes, both email and SMS.

1. How many brands or business units use your marketing automation platform? Does the data (person records, activity data, reports) require separation?

Most of the operational contact occurs in Salesforce. As a dedicated AMS the marketing department will be the primary user, however, data must flow between multiple systems and be timely and relevant to multiple users within UA Grantham.

1. Do you have systems that need to be integrated with your marketing automation platform? Ex. CRM, BI tools, LinkedIn App, Contact Washing machine, additional apps, or 3rd party vendors?

Salesforce is the CRM.  Anthology provides the Student Information System (SIS).  We also use the Google suite (gmail and calendar), Texty for SMS, Genesys Pure Connect for telephony, Calendly for scheduling.

1. Do you require contact level security, i.e. is there a need to limit who can see what contacts in Eloqua?

No.

1. Do you require Lead Scoring?  If yes, what are the estimated number of models required?

Yes; we do not do lead scoring today, so number of models is unknown.

1. Do you require a sandbox instance?  Does it need to mirror PROD?

Yes.

1. Do you have existing forms that require integration or are there requirements to set up Eloqua forms?  If so, how many?

No, we use WordPress landing pages.

1. Do you require HIPAA enablement?

No

1. Do you have individual person records that share an email address? If so, how are you managing this today? What data point do you use to identify individuals?

For duplicate detection we use exact matches on Email and GID, and we use fuzzy matching for Phone Number + First and Last name. Therefore, email addresses should be unique per Contact/Lead.

1. Do you have campaign or form migration needs? (Creative, template creation, or form build needs)

No.

1. What is the required length of pricing validity? 120 and 180 days are referenced in different places in the package.

180 days.

1. How many SMS messages do you expect to send to your audiences per month on average? For SMS messages being sent, are you only sending SMS to any other countries other than the US?

Roughly 100k SMS messages / month. International SMS messaging is not a requirement.

1. How many recruiters or outreach team members do you have on staff that receive leads from the marketing automation platform?

60.

1. The “Standard Terms and Conditions” document states—" ALL PROPOSALS SUBMITTED SHALL BE IN COMPLIANCE WITH THE GENERAL CONDITIONS SET FORTH HEREIN.  THE PROPOSAL PROCEDURES FOLLOWED BY THIS OFFICE WILL BE IN ACCORDANCE WITH THESE CONDITIONS.  THEREFORE, ALL SUPPLIERS ARE URGED TO READ AND UNDERSTAND THESE CONDITIONS PRIOR TO SUBMITTING A PROPOSAL.” Can you clarify if the “General Conditions” is “Standard Terms & Conditions”?

Respondents should read and understand the conditions set forth in the Standard Terms and Conditions document.

1. Is a scan of the ink signature acceptable? COVID has led to social distancing and remote working. So, we ask that UA Grantham accepts ink signed scan as a substitute for the ink signed original.

Yes. Acceptable signatures are ink or electronic.

1. How many “Full Users” do you anticipate will access the solution? A “Full User” allows a user to configure the system, update settings/workflows, write reports, use live chat, and own cases.

80.

1. How many “Light Users” do you anticipate will access the solution? A “Light User” allows a user to create and update contacts, run/ view pre-written reports, manage communication and events.

40.

1. Regarding live chat feature between staff and students, how many live chat users from your staff do you anticipate will access the solution?

60.

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

Yes – interested.

1. How many text messages does University of Arkansas Grantham send out each month? Each year?

Roughly 100k SMS messages / month.

1. How many applications does University of Arkansas Grantham receive annually?

12,000

1. What is University of Arkansas Grantham’s headcount as of fall ’22?

Student headcount for the July – October 2022 terms is 5,649.

1. What is University of Arkansas Grantham’s FTE as of fall ’22?

Student FTE headcount for the July – October 2022 terms is 3,904.