

## REQUEST FOR PROPOSAL

PROJECT NO. RFP 19-45

### INTEGRATION OF MICROSOFT DYNAMICS CUSTOMER RELATIONSHIP MANAGEMENT CLOUD-BASED SOLUTION

#### QUESTIONS AND ANSWERS No. 001

Date: April 16, 2019  
To: Prospective Respondents  
From: Procurement Operations Department, Houston Community College  
Subject: Questions and Answers Responses

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- Q1. Are you looking for vendors to help you implement your Microsoft Dynamics CRM solution or are you looking for vendors to replace your Microsoft Dynamics CRM solution?

**Response:** Houston Community College is seeking proposals for the design and launch of a cloud-based Customer Relationship Management (CRM) solution from vendors who have existing tools and demonstrated experience that support implementation of Microsoft Dynamics within Higher Education. HCC does not currently own the Microsoft Dynamics CRM software and the proposed solution will include all required software, implementation services, training, hosting and support & maintenance.

- Q2. Is Houston Community College specifically looking for Microsoft Dynamics as the CRM solution or is HCC open to other CRM software manufacturers?

**Response:** The proposed CRM solution must be built on the MS Dynamics platform per Section 1 item 3.a of the RFP.

- Q3. If the system require a configuration, where to add the price?

**Response:** Section 2 Price Proposal has been amended to include the following section.

#### **6.5 Configuration Cost Breakdown**

Provide a detailed schedule for the configuration related services by task in Excel format. The Configuration Cost Services shall be paid on a milestone basis and must align to the proposed schedule noted in Section 1.2.1 above and detailed Proposed Implementation Plan (Proposer's Project Schedule) noted in Section 4.4.e.ii.

- Q4. How we can get the small business points and how many points they are?

**Response:** Firms that are Certified-SBE prime or firms that are Non-SBE prime using certified SBE subcontractor may be eligible for the available 5 SBE Points as further detailed in Section 5.14, (beginning on page 23 of 46) titled Small Business Development Program (SBDP).

Q5. Do I have to be a registered vendor in order to bid and how can I register?

**Response:** No, you do not have to be a registered vendor with HCC to submit a proposal. Proper registration of your firm is a condition of award.

Q6. What systems will be integrating with or converting into Dynamics?

**Response:** HCC's Student ERP system in Oracle PeopleSoft Campus Solutions (v9.2) via the PeopleSoft Integration Broker (see table in Q24). The CRM must integrate with this system as well as the MS365 suite of products, MS Active Directory, HCC's Learning Management system – Canvas, Engineerica – AccuSQL and other 3<sup>rd</sup> party applications via an API or web-services interface. The recommended interface should be part of the proposal (see Q18).

Also, see Section 1 item 3.a-3.b; item 4.6.2; item 5.2; and item 5.9 in the RFP for more integration information.

Q7. Who will be the non-licensed users? Besides faculty and students - who else will be using the system?

**Response:** Per Section 1 item 2.1 (Phase 1), HCC anticipates implementing in Phase 1, the Prospect to Admissions to Enrollment functions of the proposed CRM. This will include using forms/screens in the CRM to collect Prospect/Recruitment data/information input at events or online by non-students (see Section 1 item 4.3) that will allow students to seamlessly move into the admission process (see Section 1 items 4.2.1, 4.2.3 and 4.2.5) and beyond.

Non-licensed users will be all types of students including non-students/prospects seeking admissions as well as applicants and current students. (see Section 1 item 4.1.2 in RFP).

Proposers should provide a definition of what a non-licensed user is in their proposed solution.

Q8. How many licensed users will you be using?

**Response:** See Section 1 item 2.1 (Project Schedule – Milestones) in RFP.

Q9. Who will be the licensed users?

**Response:** See Section 1 item 2.1 (Project Schedule – Milestones) in RFP.

Q10. What will be the typical size of a document upload?

**Response:** Proposer should provide specifications as well as any and all limitations to uploading documents (see Section 1 item 4.1.4 and Section 1 item 4.2.2 of the RFP).

Q11. Are there any concerns of security of documents being stored within CRM? Is a SharePoint integration required?

**Response:** MS SharePoint is not specified in the Scope by HCC uses MS365 and expects the proposed solution to integrate with the MS Suite of products in MS365. Documents stored within the CRM or any proposed 3<sup>rd</sup> party application must be secured at rest and in transit. Also, see Section 1 items 3.c through 3.e., item 4.1.4 and item 4.2.2 of the RFP.

Q12. How many systems does your current system integrate with?

**Response:** HCC does not currently have a CRM implemented. See Section 1 item 4.1.4; item 4.2.2

Q13. Where will the score cards and test results of a student be stored? Is this a current system?

**Response:** Test Scores (ACT, SAT, TSI) are stored in HCC's Oracle PeopleSoft Campus Solutions (v9.2) system. Proposers should provide information on the "automated interface" (see Section 1 item 4.2.4 in RFP) used to integrate data from the Oracle PeopleSoft system and how the interface can be used for other data integrations with the CRM.

Q14. For address validation, are you open to using any other tool apart from the mentioned Oracle address verification system?

**Response:** HCC uses the Oracle Address Verification system. HCC is open to Proposers recommending other tools for verifying address information as an option.

Q15. For tracking off campus recruitment purposes, what other requirements are necessary to maintain in the system?

**Response:** In addition to capturing event details, the system shall also capture personally identifiable information for prospects such as first and last name, date of birth, email address, mailing address, program of interests, extracurricular programs of interested and HCC preferred campus of enrollment. It will also be necessary to capture comments (limited to 145 characters).

Q16. In "Assign an organization or territory to a specific staff member", will the assigned worker only take care of the entire organization/territory? How does HCC manage recruitment and territory management?

**Response:** The staff member or assigned worker will be responsible for managing leads for their respective territory. For example, any leads generated through the system that are related to the Public Safety Institute Center of Excellence, should be assigned to the Northeast College Team responsible for managing enrollment leads for that program. Currently, Recruiters serve as generalists are expected to provide general program information to prospective students and interested individuals. Once an inquiry form has been completed by a prospect, the recruiters, who are assigned to specific colleges, the leads are separated by program of interest, zip code and/or high school to determine which recruiter would be responsible for following up with the

prospect. This manual process can be replaced by assigning territories to the recruiters and generating a set of pre-populated communication triggers based on the prospects' program of interest.

- Q17. Will the details of a course - payment plans, address, etc. be present in CRM as master data? What details need to be captured in the student profile?

**Response:** No, the master data will exist in the current SIS; however, the CRM should capture payment deadlines based on the information in the Student Center in the SIS to trigger automated payment reminders to students based on the balance and due date.

- Q18. What is the mechanism of integration? Does API or web service exist and can be re-used?

**Response:** Proposer must provide resource expertise for API and web services tools with proposed solution. Also, see Section 1 item 3.b and item 4.1.4.

- Q19. Will there be requirements for any non-licensed user for reporting purposes?

**Response:** Non-students/prospects, applicants and current students other will access the CRM (see Section 1 item 4.1.2). The CRM will need to provide tracking and reporting of non-licensed users accessing the CRM throughout the implementation as outlined in Section 1 item 2.1 in the Project Schedule Deliverable 1 – Phases One through Four.

Also see Section 1 item 4.2.3, item 4.3.3, item 4.3.6, item 4.5.1-4.5.6 and item 4.6.1-4.6.3.

- Q20. Is it an online or on-premises CRM? Which version and interface?

**Response:** HCC does not currently have a CRM implemented.

- Q21. What is the existing system used for all the functionalities? On what platform is it built in?

**Response:** HCC does not currently have a CRM implemented. HCC currently uses Oracle PeopleSoft Campus Solutions (v9.2) and the Highpoint Mobile system to provide secure access to student information.

- Q22. Is MSD a replacement of the existing system or CRM will integrate with existing system?

**Response:** The question is not clear and HCC assumes the reference to "MSD" is Microsoft Dynamics. HCC does not currently have a CRM implemented.

- Q23. If existing system has to be retained, which functionalities will be a part of existing system?

**Response:** HCC does not currently have a CRM implemented.

Q24. Does all master data stay in CRM?

**Response:** The proposed CRM will integrate with HCC's PeopleSoft Campus Solutions system (see table below for versions). See Q7 for further information on the Prospect to Admissions data/information needs. HCC's current enterprise PeopleSoft system version levels follow:

PS SYSTEM	VERSION	PTOOLS VERSION	INTEGRATION BROKER	ORACLE DB VERSION
Campus Solutions	9.2	8.56	8.56	12c
Finance	9.2	8.55	8.55	12c
Human Resources	9.2	8.56	8.56	12c

Q25. For any third party integration tools, will third party application teams help in providing APIs or web services?

**Response:** Proposer must provide resource expertise for API and web services tools that are included with the proposed solution. HCC's third-party application team resources will provide requested assistance for required system data interfaces via approved technical design specs.

Also, see Q24 and Section 1 item 3.b and item 4.1.4.

Q26. How many full access users do you anticipate will access the solution?

**Response:** Approximately 150

Q.27 How many read-only users do you anticipate will access the solution?

**Response:** Approximately 500

Q28. How many contacts (i.e. student prospects, existing students, former students, and parents) do you estimate communicate with you at least once each year?

**Response:** HCC receives approximately 30,000 inquiries annually.

Q29. Do you expect to use the chat feature? If so, how many chat users do you anticipate will access the solution?

**Response:** Yes, approximately 30 users.

Q30. What if I have additional questions?

**Response:** As noted in RFP 19-45 Solicitation Schedule (page 2 of 46) a second Q&A process has been scheduled and will be extended as follows.

<b>Solicitation Milestone</b>	<b>Date &amp; Time</b>
Deadline to receive written question/inquiries (QA2)	April 18, 2019 by 2:00 pm (local time)
Responses to written questions/inquiries (estimated)	April 19, 2019

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