**RFP# BPK-16-061 SALESFORCE CRM SOFTWARE CONSULTING,
PROGRAMMING & TRAINING**

VENDOR QUESTIONS/ANSWERS

1. Will UW-Oshkosh provide a list of undergraduate recruitment, admissions and marketing business processes that should be reviewed?

   ANSWER: The current processes are not documented in a manner that they can be shared at this time.

2. How many potential users will be utilizing Salesforce?

   ANSWER: Presently between 25-30 users with expected increases.

3. Please confirm that UW-Oshkosh is open to recommendations on how to better align people and the organization within undergraduate recruitment, admissions, and marketing.

   ANSWER: UWO recognizes that a successful implementation of Salesforce will revolutionize our processes and will dramatically change the way we interact with prospects and applicants. This will require us to rethink our staffing requirements, and how staffs align to processes.

4. For the data loads to the PeopleSoft system: Is it currently and automated or a manual process (if automated, with what tool). What is the recurrence of the data loads (hourly? Nightly?) What is the proposed/desired recurrence, or is it a real time integration?

   ANSWER: Currently, imports from PeopleSoft are done manually via dataloader.io . Future interfaces will be determined with this project.

5. Outside of the Lead data, what additional interfaces will be developed with the PeopleSoft system? Does all management of the information happen in PeopleSoft after the Lead stage (active students, etc)

   ANSWER: Student information will be managed in PeopleSoft at and after the time of application, but interaction will continue in CRM until time of enrollment.

6. Marketing/Email communication has been mentioned as a desired outcome of the project. Has a email marketing provider been chosen?

   ANSWER: No.

7. End user training is a request: is this internal Salesforce users (vs. Students)? Is the expectation that this training will be done onsite? Via LMS or Webinar? Or strictly documentation? Is there interest in having internal champions lead the training, with support from the Partner?

    ANSWER: Internal users. Anticipating onsite training of power users, then internal champions leading training with partner support.

8. Is the partner being engaged for only the internal side of the project, or is a Community or External Site being considered for users to manage their lead information?

    ANSWER: We are unsure of the question being asked.

9. How many leads/student prospects do you acquire on an annual basis? How are these handled now and how to you envision this changing with this project? What percentage of these become applicants? Do you have stated goals around increasing the prospect pool, or the quality of the pool, increasing conversion to applicants, and increasing yield?

    ANSWER: We follow approximately 45,000 leads annually, and are processed in our SIS. We anticipate increasing the size and quality of our prospect pool, ultimately increasing yields.

10. What data is currently being collected in Salesforce? Is this data only for prospective students and applicants, or is there other data as well (such as high schools)?

    ANSWER: We would like to collect prospective student data up to the point of enrollment, as well as high school / college data.

11. Please describe the components of your recruiting efforts today in terms of channels (direct mail, email, phone, social, events, personal visits, etc.). Which channels are most effective today? How do you envision this changing in an ideal future state?

    ANSWER: We communicate via direct mail, email, social media, telephone campaigns, on campus / off campus visits. We do not anticipate the components changing, but desire to automate when appropriate.

12. To what degree do you feel your staff are aligned with and prepared to embrace the changes you are looking to bring about in your ideal future state?

    ANSWER: Administration is desiring change, and understand that there will be many changes to business processes to reach a desirable future state.

13. How many users will be using the Salesforce CRM in this initial Phase in Admissions

    ANSWER: Approximately, 25-30

14. How is the integration currently facilitated with PeopleSoft? What data is shared? Is it Bi-directional? Is it automated or manual? Is an ETL tool utilized? What do you see as the requirements for expansion in this initial phase, in terms of types of data, and frequency and method of exchange?

    ANSWER: Not bi-directional. Currently no integration, but desire a nightly exchange between Salesforce and PeopleSoft.

15. Are there any other system integrations contemplated in this Phase other than that with PeopleSoft? If so, please provide details on the data to be shared with the proposed integration.

    ANSWER: Not currently, but additional interfaces may be required with processes defined in the project.

16. What does the school use for Request for Information forms and are there plans to change that process in the initial phase?

    ANSWER: RFI forms are currently sent to an admissions email address, where they are manually responded to and then loaded into the SIS. We desire to store RFI information in Salesforce automatically using Web-to-lead forms.

17. Does the school already have well-defined communication pathways and communication triggers that target prospects based on bio/demo as well as behavioral data (email opens, event attendance, etc.)?

    ANSWER: No, this would be developed in later projects.

18. What mass email marketing tool is in use and is integration of that tool with Salesforce in scope for this Phase or is there a need to select a new email marketing tool?

    ANSWER: Constant contact. This will be phased out with future marketing automation tools.

19. Besides email, what other communication channels do you plan to leverage using Salesforce (direct mail, SMS, social, phone, etc.)

    ANSWER: Interested in social media, phone, and open to other suggestions.

20. Is there a need to support recruiting/admissions events within Salesforce? If so, how are such events managed today?

    ANSWER: Yes, but may be in a later project. Currently done manually.

21. Are applications submitted to and read in PeopleSoft and is this model expected to continue in the next Phase?

ANSWER: They are currently submitted into the SIS, read into ImageNow. This is expected to continue.

22. How do students register for Admissions events today and is it expected this model will continue to be used?

    ANSWER: See 20. Register via webform -> email -> managed by hand.

23. Given the timeframe to respond and UW Oshkosh's commitment to sustainability outlined at the page below, we would like to respectfully request that fully and solely electronic submissions be permitted. We could send two PDF's, one with cost information and the other without. Thank you in advance for this consideration. http://www.uwosh.edu/sustainability

    ANSWER: The vendor must respond as required as specified in the RFP.

24. Are there separate recruitment processes for each undergraduate program, or does each program follow the same recruiting process?

    ANSWER: Generally, each program follows the same process. Transfers/Freshmen are different audiences within the process.

25. Is there a need to accommodate graduate processes in the future?

    ANSWER: Yes, but not in this project.

26. Please describe the desired security model in more detail:
    a. How many levels or groupings of security layers are there?
    b. Is there a need to divide data into visible/non-visible sections by type of user?
    c. Or simply control which types of users can do what?

    ANSWER: We need to create security roles, examine the visibility. Not sure of the current count.

27. Is there a governance team already in place for Salesforce/other data within PeopleSoft or other key systems?

    ANSWER: Informal data governance structures are in place, and is in process of being formalized.

28. In section 1.3.1 Project Description, you state: "Prospect information is being collected in the transferred via Prospect Data Loads from the campus SIS PeopleSoft into Salesforce system." How are imports to Salesforce currently managed?

    ANSWER: Dataloader.io used with custom Apex code for deduplication and contact creation.

29. Do you have any resources that are or will be able to utilize PeopleSoft Integration Broker?

   ANSWER: We have PeopleSoft developers on staff, but do not have a history with development of web services.

30. Do you currently import data through a Salesforce import wizard, ETL tool, or other?

   ANSWER: Dataloader.io, but we are open to suggestions.

31. Can you describe how your prospects are acquired? Do you work with any third-party vendors for inquiry development or recruitment marketing?

   ANSWER: No third party vendors at this time. We are looking into partnering with Royall and Company for development marketing. Prospects are acquired from entry points, name purchases, visits.

32. How do you currently market to your prospects? E.g., Email, direct mail, etc.?

   ANSWER: email, direct mail.

33. How do applications from https://apply.wisconsin.edu/ make it into PeopleSoft?

   ANSWER: A custom load program was created by UW-System to load the data into the SIS. This cannot change.

34. For a fall recruiting cycle, can you list the total volume of:
      a. Suspects / Leads
      b. Inquiries / Prospects
      c. Applicants

   ANSWER: Suspects/Leads/Prospects = 45,000 in 2015. 5597 Applicants in 2015.

35. What Salesforce features do you anticipate using (e.g., Live Agent chat, Marketing Cloud for mass email)? For any anticipated feature, is implementation in the scope of this RFP?

   ANSWER: We plan to eventually use some marketing automation, event management tools, but not in scope of this RFP. If additional modules are recommended, please list.