RFP #752-21-956DH  
**TITLE:** Customer Relation Software  

**SUBMITTAL DUE DATE:** May 27, 2021, 2:00 pm, local time  
**DATE:** May 18, 2021  

Addendum #1

Please note the following clarifications are hereby made to the aforementioned RFP.

**Questions and Answers**

Section 5.3 Pricing/Fees on page 8 – Does UNTS have a format for pricing that vendors are required to use?

**Answer:** Please submit your own pricing in a clear and legible manner, there is no required form.

Our current timeline to respond dictates that our bid will need to be finalized prior to 5/25 in order to print and ship on time. Would UNTS consider extending the due date by one week after the addendum with Q&A is posted to allow all vendors time to consider UNTS’ responses in their final proposals?

**Answer:** The due date is still one week away, you should have ample time to submit.

As a HUB Subcontracting Plan is not required in order to respond to this RFP, should vendor’s who are planning to use a subcontracting partner to deliver the proposed services name any partners in the proposal?

**Answer:** You may list subcontractors if you wish.

Are scanned original signatures acceptable on forms?

**Answer:** Yes

Considering the time required to ship a hard copy of proposals and the significant risk of delivery delays, vendors will only have 2-3 business days to prepare proposals. In order to provide vendors with sufficient time to prepare high quality proposals, will UNTS consider accelerating the responses to these questions and/or extending the submission due date?

**Answer:** See Question #2

Can you help us understand what solution is in place today that would be replaced by a new Salesforce solution?

**Answer:** Nothing currently

Are there any compelling events driving the evaluation or proposed project timeline?

**Answer:** No

Where does this initiative sit in terms of priority relative to other projects at UNTS?

**Answer:** We are requesting bids so that we may implement the product
Does this initiative require budget approval that has not yet been obtained?

Answer: Possibly

What technical resources from UNTS would be available to support this implementation? Please list roles and expected capacity.

Answer: It depends on the tool that we purchase

Section 2.5 states that subcontracting opportunities are not probable for this project, but goes on to say that a HSP is required. Can you confirm if this is accurate?

We do not anticipate this, but you may list subcontractors if you plan on using them.

Is UNTS open to proposals that require more than one contract? (For example, one contract for licenses one contract for implementation services)

Answer: Yes

What is the volume of calls or tickets you receive in a month?

Answer: We do not have a current metrics to provide

What percentage of your calls are from customers already in your system vs. not in the system?

Answer: We do not have a current metrics to provide

How many service agents support your call center?

Answer: We do not have a current metrics to provide

How do you measure customer satisfaction and engagement today? What tool(s) are you currently using to collect customer feedback?

Answer: Surveys

What would a great customer experience look like?

Answer: It depends on what they are asking for, but it should be good reliable information in a timely manner

What would a great agent experience look like?

Answer: N/A

What is the biggest pain point with your system today?

Answer: Nothing

What type of information are you capturing about an issue?

Answer: We do not have a case management tool today

What type of case categorization do you have?

Answer: We do not have a case management tool today
What stages do your Cases go through?

Answer: We do not have a case management tool today

Are Cases assigned directly to users or are they routed to a queue first?

Answer: We do not have a case management tool today

What type of criteria are used to evaluate a Case during the assignment process?

Answer: We do not have a case management tool today

Are there scenarios where Cases need to be escalated to another user?

Answer: We do not have a case management tool today

Are certain customers entitled to support or is it provided to all customers?

Answer: We do not have a case management tool today

Do certain customers have specific entitlements that are different from what others receive?

Answer: We do not have a case management tool today

What is your current phone system provider?

Answer: TEAMS

What is your internal capacity to admin the system and manage integrations (if any) once they are built?

Will you be migrating data from any of your systems into Salesforce?

Answer: Yes

If so, what is the source of that data?

Answer: Peoplesoft

For each source, how many constituents (contacts) and accounts do you have within your current database?

Answer: N/A

For each source, what other data types will need to be migrated (cases, knowledge articles, etc.)?

Answer: N/A

For each source, what is the volume of these data that needs to be migrated into Salesforce?

Answer: N/A

What is the quality of your data today?

Answer: good
Do you have a data governance plan?

Answer: yes

How many use cases with the chatbot need to be able to address in the initial implementation?

Answer: We do not have a case management tool today

Do you have your chatbot's processes mapped out currently?

Answer: We do not have a case management tool today

Will the chatbot need to query any external data or systems?

Answer: No

What user experience are you looking for in the chatbot initially? (e.g. menu driven questions, natural language understanding, a mix of both) ated OR it could include, if a customer hasn’t opened an email in 3 days since it was sent, another action is automated).

Answer: Mix of both

For Integrated Call Routing available, can you please expand on this specific requirement. Will you be integrating your current telephone provider into the selected CRM solution through CTI (Computer-Telephony Integration) or are you looking for the selected Vendor to provide Telephony options?

What does UNTS currently use for IT Service Management, ticketing and/or other case management systems?

Answer: Service Now

How many users will be fulfilling inquiries within Payroll, Finance and HR?

Answer: unknown at this point

Page 10 in the RFP references a “Pricing and Delivery Schedule”. Is there a specific form/schedule to complete? If so, can UNTS please provide any applicable forms/schedules?

Who exactly is considered the customer base for this tool? (i.e., University employees, students, etc.)

Answer: University employees, students, and external contacts, and or former employees

Is the expectation that the CRM will only pull in data from the current HRIS system? Or is the expectation that the CRM software will push transactional data back to the HRIS?

Answer: Only pull in data

Pages 4 and 5 in the RFP state that subcontracting opportunities are “not probable”, however, page 5 states "all proposers must submit a HUB subcontracting plan (HSP)". Can you please clarify if an HSP is required?

Answer: An HSP is not required. You may list subcontractors if you wish.

Do you have a change management plan in place? Would you like change management services to be included in proposals?

Answer: Yes, there would be a CMP in place. No, we do not need one in the proposal

How many employees/customers will you be supporting?

Answer: 18,000+
What, if any, functionality do the employees/customers need to have beyond ticket submission, knowledge base, and live chat?

Answer: That is all

How many users from HR and Payroll will need access to the CRM? Are there varying user types or roles?

Answer: It will just be Payroll and yes for varying roles

Of the total number of users in Payroll, how many will be using Live Chat with customers?

Answer: Unknown at this time

How will you be utilizing email? Will it be ‘transactional’ emails, such as confirmation of a ticket has been submitted, or an update on the ticket status, or a link to a customer feedback mechanism, OR is there a need for ‘dynamic’ emails, with personalized dynamic content and email journeys? (For example, an email journey would be: Reviewing if the customer opened the email, or clicked on a link, another action is automated

Answer: We would want it to be dynamic

For Customer Feedback Mechanism, are you looking to send a feedback survey to customers after every closed ticket or a different frequency? Are there other ways you’ll be utilizing a customer feedback mechanism?

Answer: We would want as part of the closing of the ticket the chance for feedback

What is your target go-live date and why?

Answer: Depends on the tool and how long an implementation would take

How many agents/people doing work in the shared services: Payroll, AP, procurement and IT support?

Answer: 50

For AP and procurement – will there also be external customers such as contractors, vendors?

Answer: Unknown at this time

What kind of requests/issues does UNT receive for Payroll?

Answer: Paycheck, deductions, taxes, copies, system issues, employee issues, employer issues, timesheet, GL, funding, budget, reporting

What is UNT’s HRIS?

Answer: N/A

What telephony solution does UNT use/plan to use?

Answer: TEAMS

Are the Texas regulatory requirements for PII posted?

Answer: On the state website

Are there any limitations to utilizing overseas technical resources?

Answer: Depends on the implementation
Are there any integrations needed for Phase 1?

Answer: Yes

What type of Telephony System do you operate

Answer: TEAMS

Do you have a budget for this solution:

Answer: We do not publish this information

Are you planning to use care act funds to fund this solution:

Answer: No

Are you looking to extend functionality or platform to other departments in the future? If so, which ones?

Answer: No

How is customer satisfaction and engagement currently measured by UNTS and what improvement in customer satisfaction (i.e., metric) is desired?

Answer: This is not needed at this time

In regards to displaying of customer information, which job title/organization should be prioritized/displayed if customer has multiple appointments within the system (e.g., Professors with multiple department affiliations)?

Answer: They all should appear for them to filter on the correct job

How many concurrent users (customers and organizational users?) can be expected to utilize the CRM at any given time?

Answer: Unknown at this point in time

What is the current Customer feedback mechanism

Answer: Survey

Except for HRIS, are there any other external systems that need to be integrated with the new system?

Answer: Not right now

How many internal users/agents will require access to the system?

Answer: Unknown at this point in time

How many out of them would be admin users?

Answer: Unknown at this point in time

How many external users on an average report a case?

Answer: We do not have a current metrics to provide
How is the payroll currently managed?

**Answer:** Emails

What is the current case management workflow?

**Answer:** None at this time

"The solution should include an electronic ticketing system that does not necessarily interface with the customer."

What is the existing ticketing system?

**Answer:** We do not have a case management tool today

What is the existing Database that UNTs is using?

**Answer:** PeopleSoft

Is there any data migration required from existing systems to the new system?

**Answer:** None at this time

If yes, please provide the size of the data that is to be migrated?

Is any data visualization tool required for presenting data internally? Like Power BI or Tableau

**Answer:** None at this time

How many employees/customers will you be supporting?

**Answer:** 18,000+

What, if any, functionality with the employees/customers need to have beyond ticket submission, knowledge base, and live chat?

**Answer:** Survey

How many users from HR and Payroll will need access to the CRM. Are there varying user types or roles?

**Answer:** It will only be Payroll, but the number is unknown at this point in time

Of the total number of users in Payroll, how many will be using Live Chat with customers?

**Answer:** Unknown at this point in time

How will you be utilizing email? Will it be ‘transactional’ emails, such as confirmation of a ticket has been submitted, or an update on the ticket status, or a link to a customer feedback mechanism, OR is there a need for ‘dynamic’ emails, with personalized dynamic content and email journeys? (For example, an email journey would be: Reviewing if the customer opened the email, or clicked on a link, another action is automated OR it could include, if a customer hasn’t opened an email in 3 days since it was sent, another action is automated).

**Answer:** Dynamic

For Integrated Call Routing available, can you please expand on this specific requirement. Will you be integrating your current telephone provider into the selected CRM solution through CTI (Computer-Telephony Integration) or are you looking for the selected Vendor to provide Telephony options?
Answer: Yes, that is the current thought

For Customer Feedback Mechanism, are you looking to send a feedback survey to customers after every closed ticket or a different frequency? Are there other ways you'll be utilizing a customer feedback mechanism?

Answer: After the ticket is closed

What telephony system do you currently use?

Answer: Already asked

Do you have an implementation timeline or an anticipated go live date? Do you have a budget allocated for this project and, if so, what is the budget?

Answer: Already asked

Will hardcopy submission be the only format of RFP response or with the UNTS relax this requirement for electronic proposal delivery?

Answer: No, you must submit a hard copy RFP proposal.

How many seats or users will the solution be licensed for initially?

Answer: Unknown at this point in time

What type of phone system is in use currently?

Answer: TEAMS

What SSO is in use currently?

Answer: We do not have a case management tool today

What email platform is in use?

Answer: Outlook

What HRIS solution is in use?

Answer: N/A

End of Addendum-

Denise Harpool

Issued by (signature)

May 18, 2021
Date

ACKNOWLEDGEMENT: Please acknowledge receipt of this addendum by initialing the appropriate line on the Addenda Checklist, Section 4 of the RFP.