REQUEST FOR INFORMATION (RFI)
RFI752-21-956DH
DATE: October 30, 2020
Customer Relations Management Software

Responses to this Request for Information must be submitted to:
denise.harpool@untsystem.edu

Mailed responses to:
UNIVERSITY OF NORTH TEXAS SYSTEM
Business Service Center
Attention Denise Harpool
1112 Dallas Drive
Suite 4000
Denton, Texas 76205

Request for Information (RFI)
A document to determine what products and services are potentially available in the
marketplace to meet the agency’s needs and to know the capability of a vendor in
terms of offerings and strengths. An RFI, however, is not a request for pricing, is not
binding on either the agency or vendors, and may or may not lead to an RFP.

Submittal Deadline:
UNT System will accept responses to this RFI until 4:00 PM, Central Time on

General Description:
The University of North Texas System (UNTS) is a public institution providing:
value-added analysis & advice; strategies to enable growth & create value; effective
and efficient customer services to three institutions of higher education. These
institutions are the University of North Texas in Denton, UNT Health Science
Center in Fort Worth, and UNT Dallas in Dallas, TX.
UNTS is interested in exploring a vendor solution for a Customer Relations
Management program that can meet requirements to support our internal
customers/employees. Any solution must support a commitment to compliance with
federal and state regulations, industry-accepted practices, and the high professional
standards associated with UNTS.

The University of North Texas System
The University of North Texas System inspires courageous discovery that empowers
our students, campuses, and communities to pursue a brighter vision for tomorrow.

The UNT System is the only university system based exclusively in the Dallas-Fort
Worth region, and includes the University of North Texas, University of North Texas
Health Science Center and University of North Texas at Dallas. As DFW’s regional
leader in higher education, we are setting a new standard for North Texas and beyond – creating opportunities and meeting economic needs through forward-thinking education. Our campuses in Dallas, Denton, Fort Worth and Frisco offer more than 300 bachelor’s, master’s, and doctoral degree programs that provide students from all backgrounds with the tools and confidence to reach their full potential.

Our record growth, from campus expansion to an ever-increasing enrollment of more than 45,000 students, plays a dynamic and continuous role in the advancement of our region. In all we do, whatever goals we achieve and whatever challenges we face, we seek to inspire that same courageous growth in others, as together we pursue a brighter future for all of North Texas.

As innovators, scholars and problem-solvers, we are eager and prepared to help Texas and our home Dallas-Fort Worth area recover from the many challenges presented by the COVID-19 pandemic. As we work to emerge from the pandemic, our institutions have become stronger – particularly in community leadership, use of technology, collaborative partnerships and service to our students, faculty and staff.

UNT System Institutions
~UNT, our flagship university in Denton, is a Tier 1 research university with more than 40,000 students. UNT's vision is to become globally known for collaborative and imaginative educational innovation and scholarly activity that transforms students and benefits the world. UNT is expanding its influence in the North Texas region as it builds a new, innovative campus in Frisco, Texas.
~UNT Health Science Center in Fort Worth is one university, built on values, defining and producing the healthcare providers of the future. UNTHSC is one of the nation’s premier graduate academic medical centers, with more than 2,000 students and six schools that specialize in patient-centered education, research and health care. UNTHSC is the top producer of primary care physicians in Texas and is a leader in DNA and aging/Alzheimer’s Disease research.
~Through education and community connectedness, UNT Dallas aspires to be the pathway to socioeconomic mobility in its primary market. UNT Dallas is one of the fastest-growing universities in Texas with more than 4,000 students, UNT Dallas’ main campus is located in southern Dallas, while its UNT Dallas College of Law is located in downtown Dallas.
~UNT System Headquarters, also referred to as UNT System Administration, was founded in 1999 and provides governance and service to UNT System component institutions in the areas of legal, finance, audit, academic affairs and student success, facilities and construction, human resources, information technology and government relations. Chancellor Lesa Roe leads UNT System Headquarters.
The purpose of UNT System Headquarters is to lead, serve and inspire. Like its counterpart central administrative offices across Texas, the UNT System:
Provides executive leadership;
• Represents the University of North Texas System and its component institutions in all legal matters;
• Leads the development of educational mission, policy, and programs and facilitates and coordinates new initiatives and academic and student affairs planning and implementation;
• Oversees system-wide financial planning and analysis, including coordination of the annual institution budgets within the UNT System;
• Supervises compliance with federal, state, and local laws and with Board of Regents policies;
• Provides a full range of professional design, development and management support for facilities planning and construction;
• Establishes state and federal legislative and policy priorities for the System in collaboration with the Board of Regents institutional leadership and engages constituencies and stakeholders at all levels of government on issues impacting higher education;
• Coordinates relationships with the region’s communities and organizations and other university systems.

The goal:
  a. To locate and deploy a customer service technology, Customer Relationship Management software (CRM) to assist Payroll (and eventually other shared services such as AP, purchasing, IT support and other customer-facing processes) in their mission of providing world-class customer service to UNT World employees.
  b. The tool should be a centralized system for tracking, prioritizing, managing, responding to, and resolving customer requests.
  c. The system should include a human interface with the customer at the beginning, during set checkpoints, and at the end of the resolution process.
  d. The solution should include an electronic ticketing system that does not necessarily interface with the customer.
  e. The system should provide the team with information about who the customer is, their job title and organization, and any issues reported in the past.

What we hope to achieve:
  a. Increased customer satisfaction and engagement.
  b. Equipping our team with the tools necessary to be prepared and motivated to assist the customer thereby increasing productivity and saving resources.
   
Customer-centric agility. Enhance our ability to grow and scale the solution based on the needs of our customers.

Types of solutions to be consider:
  a. Live chat
  b. Chat bot
  c. Phone support
  d. Email
  e. Knowledge base
  f. Hybrid - an amalgamation of all of the above
  g. Others as recommended
Other Considerations:
  a. Mobile friendly solution
  b. Call routing available
  c. Configurable by the internal department (by non-IT personnel)
  d. Training resources available
  e. Interface with HRIS to integrate basic employee data
  f. Encryption available to protect PII entered by customer in motion and at rest
  g. API
  h. Single Sign-on
  i. Customer feedback mechanism

Requested Response:
This Request for Information is an attempt by UNTS to better understand the options available to the institution given budgetary, compliance, and implementation parameters under which UNTS must operate. Vendor forthright responses are strongly encouraged. UNTS respectfully requests respondents provide the following in response to this RFI:

  a. Letter of Interest
  b. Solution Overview
  c. List of entities of higher education where Respondent’s solution is or has been recently implemented. Please provide a contact for each example.
  d. Provide some potential financial structures and/or cost models for consideration.
  e. Company overview
  f. If you have been awarded a federal, state, or cooperative contract through a competitive solicitation, UNTS would be interested in obtaining more information in that regard.

UNTS does request that responses be limited to twenty (20) pages or less. Voluminous marketing or detailed information should be provided as separate attachments.

Tentative timeline:
  a. RFI issued October 30, 2020
  b. Questions regarding RFI due no later than November 17, 2020
  c. RFI Submittal Due from Interested Vendors November 20, 2020
  d. Evaluation period and follow-up Nov – December 31, 2020

Terms and Conditions:
UNTS will not provide compensation to any respondent to this RFI for any expenses incurred by respondent for response preparation. Respondent submits its response at its own risk and expense. All responses to this RFI and any supporting documentation will become property of UNTS. UNTS considers all information, documentation and other materials requested to be submitted in response to this RFI to be of a non-confidential and/or non-proprietary nature and, therefore, may be subject to public disclosure under the
Texas Public Information Act (Texas Government Code, Chapter 552.001, et seq.). Respondent is hereby notified that UNTS strictly adheres to all statutes, court decisions and opinions of the Texas Attorney General with respect to disclosure.

Questions/Additional Information:
Respondents should direct all questions or concerns regarding this RFI to the following UNTS contact:
Denise Harpool
Senior Buyer, UNT System Procurement
denise.harpool@untsystem.edu

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