



Proposal No. P20/10023L Marketing Automation

Answers to Vendor Questions – Questions are in black, **answers are in red**

1. Question: What teams/department will be using the Marketing Automation solution?

Answer: Current state: Marketing & Communications. Future state: Multiple units.

2. Question: What is driving this initiative internally at Pima?

Answer: Current contract expiring, triggering RFP process.

3. Question: What are some examples of ways Pima CC anticipates being able to leverage a Marketing Automation tool?

Answer: Increasing student inquiries, applicants, and registrants. Improving persistence, retention and completion among current students. Improving engagement with external constituents.

4. Question: What channels outside of social media and digital advertising would Pima be looking to leverage?

Answer: Email, events, text.

5. Question: What applications do you anticipate needing to integrate to? Which ones will you need for day one?

Answer: Salesforce.

6. Question: What are your onsite vs remote project work expectations?

Answer: We anticipate discussing this topic with the awarded vendor.

7. Question: Is this an approved and budgeted initiative – both on the software and implementation side? If so, you have an anticipated software and implementation budget range allotted that we should target?

Answer: Yes. We have a budget. We do not divulge it.

8. Question: How have you worked with other consulting implementation firms in the past? Are you open to working with a new partner?

Answer: We have not worked with a “consulting implementation” firm. We are open to working with a new partner.



9. Question: Will there be business process re-engineering with the project? Describe the areas where you feel you need to change. Will you need assistance with it?

Answer: We do not foresee re-engineering our business process.

10. Question: Are you open to implementing the functionality in phases? If so, what are the must-have pieces of functionality for phase 1 go-live?

Answer: We are open to implementing the functionality in phases, with triggered email campaigns a priority.

11. Question: What are the desired start and end dates for the implementation? Are there reason/driving factors behind that date?

Answer: Desired start date is Spring 2020, to support our Fall Enrollment Campaign.

12. Question: How much post-go-live support will you require? Should ongoing managed services be quoted as well?

Answer: From the RFP: "Responses must submit a detailed training and support package" and "We are looking to be able to collaborate on robust on-site training for multiple users/units, followed *immediately* by real-world application of knowledge by Pima users. Subsequently, multiple levels of support . . . to build campaigns that realize the College's vision."

13. Question: Do you have a preferred project methodology? Agile, Waterfall or a hybrid of the two?

Answer: Hybrid

14. Question: What documentation is required during the implementation?

Answer: Technical documentation typical to projects of the scope described in the RFP.

15. Question: What languages do you anticipate needing?

Answer: English and Spanish currently

16. Question: Please highlight any Region/Location specific requirements we should know about.

Answer: See the "Background" section of the RFP.



17. Question: What kind of training approach do you typically do for software implementations? For the implementation partner, should we quote a train the trainer approach or having trainers develop training materials and deliver to the end user population?

Answer: See answer to Question 12.

18. Question: How much historical data would need to be converted? Please describe anticipated volume by functional area.

Answer: Unknown at this time. We anticipate discussing this topic with the awarded vendor.

19. Question: What kind of engagement are you looking for? A comprehensive implementation, a combined partnership where both parties participate, more of a staff augmentation approach where the SI provides only functional/technical system expertise?

Answer: From the "Project Summary" section of the RFP: "The College is seeking a strategic partner"

20. Question: Page 6, 1st paragraph, *Lead scoring/analytics/tracking: The College currently uses Salesforce and Banner for lead scoring/analytics/tracking and will continue to do so. Responses must show compatibility with these systems.* Please describe the envisioned workflow for the requested integration between the proposed marketing automation solution for both Salesforce and Banner.

Answer: We anticipate discussing this topic with the awarded vendor.

21. Question: Do you have a timeline of major events for this RFP? (i.e., project start date, go-live date, etc.)

Answer: See answer to Question 11.



22. Question: In regards to page 5 section 2, what Salesforce license are you currently on? How many users do you currently have?

Answer: Currently we have purchased the following licenses and quantities:

<u>Salesforce Licenses</u>	<u>Quantity</u>
Legacy Customer Community	2
<u>Enterprise Editions</u>	
Legacy Lightning CRM	20
Lightning Platform Starter	60
Lightning Sales Cloud	24
Lightning CRM P10	10

23. Question: In regards to page 5 section 2, is Salesforce currently integrated with Banner?

Answer: Yes

24. Question: In regards to page 4 section 2, what is your current Marketing Automation Platform?

Answer: Marketo

25. Question: In regards to page 4 section 2, how many users will need access to the new MAP?

Answer: Multiple

26. Question: In regards to page 5 section 2, are there different levels of users? If so, what are they?

Answer: We foresee different levels and types of users working to achieve goals outlined in the answer to Question 3.

27. Question: In regards to page 5 section 2, how many users will need access to texting?

Answer: We anticipate discussing this topic with the awarded vendor.

28. Question: In regards to page 5 section 2, what functionality are you wanting the new MAP to have in regards to social media?

Answer: We anticipate discussing this topic with the awarded vendor.



29. Question: In regards to page 5 section 2, what type of events are you looking to host?

Answer: Events that enhance enrollment or community engagement. We anticipate discussing this topic further with the awarded vendor.

30. Question: In regards to page 5 section 2, how many events does Pima have per month? Per year?

Answer: Amount varies per month. Pima holds dozens of events a year.

31. Question: In regards to page 5 section 2, on average, how many emails do you send per month?

Answer: Amount varies per month. At least 25,000.

32. Question: What will success look like in the first 12-18 months after the implementation of your new MAP?

Answer: Measurable improvements in enrollment and community engagement.

33. Question: Aside from email, what other channels are you hoping to begin using?

Answer: From the RFP: A successful proposal must “integrate a variety of delivery methods, including email, digital advertising, social media, text messaging, and event management.”

34. Question: What does the creative process look like within your Marketing/Communication team? Do you employ a third-party agency or is creative developed in-house?

Answer: Pima develops creative in-house, and employs a third-party agency.

35. Question: How is your current Marketing/Communications department organized? (# of business unites, # of people responsible for preparing, running, reporting on Marketing campaigns)

Answer: Marketing/Communications consists of a director who supervises three coordinators.

36. Question: Do business units operate independently or share resources / data sources?

Answer: Share.



37. Question: Do you have a content production team?
- Answer: Yes
38. Question: Who are the users of your MAP (Marketing Automation Platform) System today? Please list them out and the departments they are from.
- Answer: See answer to Question 1.
39. Question: Do you have internal resources with a high level of technical aptitude?
- Answer: In general, yes.
40. Question: How much experience does the team have with Marketing Automation?
- Answer: Limited.
41. Question: Do you feel you have a strong data-driven marketing strategy in place or would you be looking to engage us to help with building this?
- Answer: We have a data-driven marketing strategy and are looking to improve it.
42. Question: Which areas within digital marketing do you feel are your strengths versus weaknesses?
- Answer: Strength: content creation. Challenge: Easy access to actionable data is an ongoing concern for the college.
43. Question: What is the time expectation for continuing support?
- Answer: Support should be ongoing through the life of the agreement.
44. Question: How many users will be trained initially? Does your organization support a “train-the-trainer” model?
- Answer: See answer to Question 12.
45. Question: How many subscribers do you have in your MAP (Marketing Automation Platform)?
- Answer: A few dozen.



46. Question: Which MAP audiences are in scope for this engagement?
- Prospects and Students
 - Alumni
 - Others? (i.e. Donors)

Answer: Prospective and current students, and members of the community, are within the scope of the engagement.

47. Question: How do you define a prospect?

Answer: A potential student who is not a lead, i.e. has not shared contact information.

48. Question: How do you define an applicant?

Answer: A potential student who begins an application to attend Pima.

49. Question: How many are active as opposed to lapsed?

Answer: We have large pools of inquiries who have inquired over various time frames.

50. Question: How are your lists in MAP currently structured?

Answer: Lists are segmented within the MAP.

51. Question: How would you categorize your target audience? E.g. prospects, students, alumni, etc.

Answer: See answer to Question 46.

52. Question: What are your segmentation requirements for your marketing communications? E.g. Location (country), age group, application status, program areas of interest, undergraduate / graduate status, year of admission, primary language, others?

Answer: Multiple segmentations required.

53. Question: What type of personalization and dynamic content would you need in your email sends?

Answer: We anticipate discussing this topic with the awarded vendor.



54. Question: Given that 45% of College students are Latin, do you have any specific localization requirements for your email sends? (i.e. Do you communicate in both English and Spanish?)

Answer: 45 percent of students are LatinX, i.e. Hispanic. We communicate primarily in English.

55. Question: What types of email campaigns are you currently running?

Answer: Blast and triggered.

56. Question: Which are set up as batch and blast versus triggered or automated?

Answer: Campaign based on RFI form fill is triggered. Other campaigns are mostly batch.

57. Question: For existing triggered campaigns (i.e. Triggered campaign for prospective students tailored to a student's academic interest), do you have engagement flows you could provide that show the series of emails being sent and any decision paths?

Answer: We anticipate discussing this topic with the awarded vendor.

58. Question: What does your frequency and volume look like?

Answer: See answer to Question 31.

59. Question: Do any of your campaigns currently contain elements of digital and traditional marketing? i.e. Email and Direct Mail

Answer: Yes.

60. Question: What channels are in use today? i.e. Email, Direct Mail, Digital Advertising, Social Media, SMS

Answer: All but SMS

61. Question: Do you use a branded sub-domain or intend to (eg. e.pima.edu)?

Answer: We currently use one branded subdomain. On March 20, we will launch a redesigned pima.edu that will eliminate the need for the subdomain.

62. Question: Do you want the ability to send MAP email directly from the CRM via the MAP (eg a user can deliver a message via the MAP without leaving the CRM)?

Answer: We anticipate discussing this topic with the awarded vendor.



63. Question: Do you want the ability to automate a message based on CRM events (eg a user value is updated in CRM and triggers a campaign flow?)

Answer: Yes.

64. Question: What MAP system is currently in use today?

Answer: Marketo.

65. Question: What are the current data sources feeding the MAP?

Answer: RFI forms, events, purchased email lists.

66. Question: What are the current data sources feeding the MAP?

Answer: See answer to question 65.

67. Question: Does MAP integrate with other systems other than the CRM? If yes, please list out which systems and integrations apply.

Answer: Enrollment Rx

68. Question: Which system is the single source of truth for the customer record?

Answer: Banner

69. Question: What other platforms exist in your current infrastructure? Please list out the system names.

- MAP – [TBD]
- CRM – Salesforce
- Event Management – [TDB]
- Website / CMS – [TBD}
- Analytics – Banner

Answer: Salesforce, Banner and Cascade/Hannon Hill CMS.

70. Question: What integrations currently exist that are important to be aware of?

- Salesforce Lead Scoring?
- Banner?
- Others?

Answer: See answer to Question 69.



71. Question: How do you feel about the current state of your data quality? Can you trust it?

Answer: See answer to question 42.

72. Question: How would you rate the ease of access to data for (scale of 1-10):

- Segmentation
- List preparation
- Reporting
- Remarketing

Answer: See answer to question 42.

73. Question: Are there any security restrictions your organization or individual business units must apply?

Answer: From the RFP: "For web or internet access products: Provide the level of Web Content Accessibility Guidelines (WCAG) 2.0 (A, AA or AAA) compliance of the product/service including any exceptions to meeting the specific requirements of the Level.

"For web or internet access products, telecommunications, multimedia, desktop and portable computers: Product/service must meet Section 508 requirements. Answers provided to questions in relevant sections of the Voluntary Product Accessibility Template (VPAT). Information on the VPAT is found on the Information Technology Industry Counsel website (www.itic.org)."

74. Question: Do you have data residency requirements for MAP?

Answer: See answer to Question 73.

75. Question: Do you have Personal identifiable information (PII) restrictions / regulations for MAP? If yes, please elaborate.

Answer: Yes, we have PII regulations.

76. Question: Do you have encryption and/or tokenization requirements for MAP? If yes, please elaborate.

Answer: We anticipate discussing this topic with the awarded vendor.

77. Question: Are you able to provide a high level data flow diagram or view of your current state architecture?

Answer: No. We anticipate discussing this topic with the awarded vendor.



78. Question: What is the size of your database?
- Size of your current MA database?
 - Size of your current CRM database – leads and contacts? Leads and contacts with email?

Answer: MA database, 50,000. CRM database. See answer to Question 121.

79. Question: Data model – Do you use Person Accounts? Households?

Answer: See answer to Question 121.

80. Question: Security model – explain your security model: Are leads, contacts and accounts public or private?

Answer: Private.

81. Question: Packages – do you have any packages installed in your CRM instance? (i.e. Education Data Architecture (EDA))

Answer: See answer to Question 121.

82. Question: Custom objects – what custom objects do you have that would be of use in your MA system for Marketing?

Answer: See answer to Question 121.

83. Question: CRM environments – how many environments do you have?

Answer: See answer to Question 121.

84. Question: CRM deployment / change process – What is your release schedule? Please walk us through your testing and deployment process and cycles.

Answer: See answer to Question 121.

Lead Generation:

85. Question: How do you capture your target audience? What are your lead sources?

Answer: Events, form fills, landing pages, Google Adwords, social media.

86. Question: Online sources – website forms, website landing pages, email, Google adwords, social media, etc.?

Answer: Yes to the above.



87. Question: Offline sources – events, lists, etc.?

Answer: See answer to Question 85.

88. Question: How similar are the prospect lifecycles for undergraduate versus graduate prospects? Do you have other program or product lifecycles to consider? (i.e. Adult Basic Education)

Answer: Lifecycles vary depending on multiple variables. Pima does not award graduate degrees.

89. Question: What is your current forms solution/tool?

Answer: Depending on the need, Pima uses a wide variety of forms tools. For example: in-house custom forms development/reporting, Google forms, or can use our CMS forms tool.

90. Question: How many forms do you have?

Answer: Multiple.

91. Question: What are they?

Answer: See answer to Question 92.

92. Question: For each form:

- What is the purpose? Eg. Contact Us
- What are the data captured? Eg. email, first name, last name
- Is there an automated response email? Eg. yes, confirmation email
- Is there an internal process flow triggered by a form submission? Eg. yes, the lead gets sent to our CRM and team X gets notified.

Answer: Marketing's primary form is Contact Us. We capture:

- First Name
- Last Name
- Email address
- Phone number
- Area of Interest: Health Professions, Education, etc.

There is an automated response email. There is an internal process flow triggered by a form submission.

93. Question: Which forms need to be migrated from your existing MAP to the new MAP system? Please list out which ones apply.

Answer: See answer to Question 92.



94. Question: What is your current landing page solution?

Answer: From the RFP: **Landing pages: Current state:** The College has created landing pages through the MAP. **Future state:** Rapidly diminishing need, as the College's public website is being redesigned to meet the marketing needs of the College.

95. Question: Do you have landing pages?

Answer: See answer to Question 94.

96. Question: How many?

Answer: See answer to Question 94.

97. Question: What are they?

Answer: See answer to Question 94.

98. Question: Is there a projected date for the launch of the College public website redesign?

Answer: March 20, 2020.

99. Question: Given that there will be a College public website redesign, do you foresee needing to migrate any Landing Pages from your existing MAP to the new MAP system? If yes, please list out which ones will require a migration.

Answer: See answer to Question 94.

100. Question: Do you capture/track email opt-ins vs. opt-outs? How?

Answer: We capture opt-outs through our current MAP.

101. Question: Do you have an email unsubscribe centre?

Answer: We have unsubscribe capability.

102. Question: Do you capture/track email preferences?

Answer: Not at this time.

103. Question: Do you have an email preference centre?

Answer: No.



104 Question: Which Salesforce Lead Scoring are you using today?

- Lead Scoring –
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N300000024tT3EAI>
- Einstein Lead Scoring? -
https://help.salesforce.com/articleView?id=einstein_sales_lead_insights.htm&type=5
- Or something else?

Answer: See answer to Question 121. We anticipate discussing this topic with the awarded vendor.

105 Question: Do you have a lead scoring / grading model? If yes, please share.

Answer: We anticipate discussing this topic with the awarded vendor.

106 Question: What are your key demographic factors? E.g., location, age, gender, program interest area, etc.

Answer: Age, Gender, Area of Interest. Pima is a Hispanic-Serving Institution.

107 Question: What are your key behavioral factors? Eg. web visits, form submission, video views, event attendance, etc.

Answer: Current state: Form submission. Future state. We anticipate discussing this topic with the awarded vendor.

108 Question: Define a qualified lead (i.e. when do you consider it hot)?

Answer: Filling out an RFI form.

109 Question: Would there be interest in transitioning to a MAP Lead Scoring / Grading system? (As opposed to leveraging Salesforce Lead Scoring)

Answer: We anticipate discussing this topic with the awarded vendor.

110 Question: What are the teams that Marketing/Communications is serving?

Answer: Multiple.



111 Question: Lead assignment – How are leads assigned to teams? What are your lead assignment rules?

Answer: See answer to Question 112.

112 Question: Alerts/tasks – How are these teams notified?

Answer: Failure of inquiry to advance to Application Started triggers email for follow-up engagement.

113 Question: Lead Statuses – what are your lead statuses

Answer: Multiple, including Prospect, Inquiry, Application Started, Application Completed.

114 Question: Lead processing – How do teams prioritize leads? What is your SLA? Average time to process leads? Average time to close an opportunity?

Answer: We anticipate discussing this topic with the awarded vendor.

115 Question: Describe your lead to contact, account, and opportunity process.

Answer: We anticipate discussing this topic with the awarded vendor.

116 Question: Do you use opportunity contacts?

Answer: We anticipate discussing this topic with the awarded vendor.

117 Question: Current reporting – how do you currently measure marketing effectiveness and other KPIs?

Answer: See answer to Question 42.

118 Question: Future needs – what reports/dashboards do you feel you are missing?

Answer: See answer to Question 42. We anticipate discussing this topic with the awarded vendor.

119 Question: Does Pima CC have an anticipated award date for this RFP?

Answer: We hope to have a vendor selected in the Spring.

120 Question: What departments are involved for this initiative?

Answer: Multiple.



121 Question: Are the end users for this solution familiar with Salesforce technology?

Answer: In general, no. Lack of Salesforce technology is an ongoing concern.

122 Question: How many different email templates will the College be looking to leverage? i.e. One universal template, one template per business unit/university group, etc.

Answer: The fewer, the better.

123 Question: How many departments and/or teams at Pima will be using the MA platform?

Answer: Multiple units.

124 Question: Please list the names of each department and/or team who will be using the MA platform?

Answer: Multiple units.

125 Question: Please provide an estimated total number of users of the MA Platform (if including a range, the difference should be no more than 5 users):

Answer: 10-15

126 Question: Will the College want future Professional Services to deliver a facilitated training approach for campaign building? Or, would the team prefer full managed services to build campaigns that realize the College's vision?

Answer: See answer to Question 12.

127 Question: How many text messages does the College expect to send annually?

Answer: Unknown at this time. We anticipate discussing this topic with the awarded vendor.

128 Question: What is the size of the College Section Committee? Can you please include the Title and department of each Committee member?

Answer: We will release this information after the award.

129 Question: What is the timeline for completing the initial review of the RFP materials?

Answer: We do not have a specific timeline.

130 Question: When will the selected offerors receive notice if they will be required to make an on-site presentation or demonstration?

Answer: As soon as finalists are chosen.



131 Question: How long will selected offeror have to plan travel for an onsite visit for demonstrations and presentations?

Answer: If travel is required, once finalist are chosen we will move to the next phase of the proposal process.

132 Question: Will offerors who do not move forward receive notification? If yes, by what date will they receive notification?

Answer: Award information is sent in a letter once the final contract is signed.

133 Question: By what date will a vendor of choice be selected?

Answer: We have not set date.

134 Question: After a vendor of choice is selected, how soon will the college be looking to implement?

Answer: Schedule will need to be worked out between the vendor and the college.