Tool #24: RFP Creation Template

Many CRM champions are forced into the unfamiliar territory of writing an RFP due to institutional procurement policies. A well-crafted RFP can save staff time otherwise spent watching parades of vendor demos that don't meet university needs by helping the right vendor find you. The Request for Proposal (RFP) template and sample RFP list is designed to help you draft the RFP that will attract vendors who can come closest to your technical, support, and cost ideals. Review the template first, with descriptions of each part of the RFP, then visit the seven CRM RFP samples hyperlinked at the end of this document. The template and the sample RFPs are intended to give you an overview of the many ways to structure your RFP and the content that you want to include; the template is not exhaustive and may not have items that your particular unit will need to include.

Typical CRM RFP Structure[1]

1. Institutional Information	**1.1 University/Unit overview**: provide a description of your organization including student and staff sizes, locations, number of system users, current CRM capabilities and systems, stakeholders, system expansion plans, and business goals you are looking to achieve. **1.2. Technology environment:** Provide a detailed description of your technology environment including a combination of the following: LAN diagram, telephony systems, server operating system, student information system, desktop operating system, programming languages, web architecture, applications, etc.
2. Statement of Work	**2.1 Purpose:** The purpose of this Request for Proposal (RFP) process is to invite vendors to submit their proposal to provide a Customer/Student Relationship Management (CRM) system outlining product functionality and corresponding cost. This document contains the business and system requirements necessary for a successful CRM system implementation for any organization. **2.2 Scope:** Provide a description of each department that will be using the CRM system. Additionally, document what is in scope for this project and explicitly state what is not in scope. If you are planning on a phased approach, provide a summary of what each phase will look like from your perspective. **2.3 Project Schedule:** Subject to change: RFP Delivered to Vendors: mm/dd/yy Technical Question Period Ends: mm/dd/yy RFP Close Date: mm/dd/yy Conduct Vendor Evaluations: mm/dd/yy Award Contract to Vendor: mm/dd/yy
3. Proposal Submission Procedure	**3.1 Vendor RFP Response:** By responding to this RFP, the vendor agrees to be responsible for fully understanding the requirements and details of the RFP and will ask any questions to ensure such understanding is gained. [Insert your institution's name] retains the right to disqualify vendors who do not demonstrate a clear understanding of our needs. Furthermore, the right to disqualify a vendor extends past the contract award period and [Insert your institution's name here] will be at no fault, cost, or liability.

[1] Adapted from Demand Metric's "CRM System RFP Template," available here: http://www.docstoc.com/docs/11760060/CRM-System-RFP-Template.

3. Proposal Submission Procedure	**3.2 Good Faith Statement:** All information provided by [insert your institution's name] is offered in good faith. Specific items are subject to change at any time based on business and organizational circumstances. [Insert your institution's name] retains the right to disqualify vendors who do not demonstrate a clear understanding of our needs. Furthermore, the right to disqualify a vendor extends past the contract award period and [insert your institution's name] will be at no fault, cost, or liability. **3.3 Communication and Proposal Submission Guidelines:** Communications shall not be effective unless a specified procurement executive who is responsible for managing the RFP process formally confirms these communications in writing. In no case shall verbal communication govern over written communications. Please submit your proposal by [insert RFP close date]. Please send questions related to this RFP and vendor proposals to: [Insert your institution name] [Insert department name] [Insert mailing address] Attention: [Insert contact name and title] [insert phone/email/fax contact information] **3.4 Evaluation Criteria** All proposals will be evaluated systematically, based on the following key criteria. The purpose of this section is to identify suppliers with the interest, capabilities, and financial stability to supply a CRM system, as defined in the Scope of Work. Following is a prioritized list of our key evaluation criteria: 1. [Insert Criterion] 2. [Insert Criterion] 3. [Insert Criterion] 4. [Insert Criterion] 5. [Insert Criterion] **3.5 Short-list Selection:** Vendors who have demonstrated their capacity to meet our needs will be contacted via phone and/or mail to be notified of their selection to move forward in the RFP process. Vendors who have not been selected will not be contacted.
4. Scope of Work and Business Requirements	This section will provide a categorized list of business and system requirements, with an associated description for each requirement. These requirements will provide the foundation for vendor presentations, discussions, and negotiations. **4.1 General Features and Requirements** 1. Secure Web Access—the CRM system can be accessed remotely by users. 2. Shared Calendars—calendars can be viewed based on role and permissions. 3. Activity Planning and Tracking—tasks can be assigned and tracked on an individual basis and/or generated automatically based on business rules. 4. Microsoft Office Integration—ability to integrate with Outlook, Exchange, Word, and Excel, including ability to import/export Excel and CSV files. 5. Accounting System Integration—ability to integrate with QuickBooks 6. Workflow Automation—ability to integrate and automate business processes 7. Customization of Reports—flexible and intuitive report generation

4. Scope of Work and Business Requirements	**4.2 Technical Features and Requirements** 1. User and Group Security Settings—role–based security and permissions 2. PDA Integration—online/offline access and integration with wireless devices such as blackberries; ability to synchronize data remotely; call handling; dispatching, and scheduling 3. Microsoft System Integration—supports Windows 7 operating system, Microsoft IIS, Microsoft SQL DB 4. Customization Capabilities—flexible administration and customization 5. Integration with Third Party Application—provides interface of API to integrate other third party applications such as quote generators 6. Supports XML—internal/external data is exchanged using XML industry standards, not a proprietary language **4.3 Contact Management Features and Requirements** 1. Account history and Tracking—simple, user-friendly interface to add account information such as contacts, phone, address, email, fax, website, preferences, “do not contact” or other account related details 2. Call/Email History and Tracking—ability to record phone calls and emails 3. Customizable User interface—ability to customize views and interfaces 4. Mail Merge – the CRM system can leverage marketing databases to insert contact information into documents such as letters or mailing labels 5. Customizable Objects and Fields—ability to create custom fields/objects 6. Advanced Search—ability to search contacts, notes, email/call history 7. List Building and Management—ability to create lists of contacts, tasks, etc. 8. Contact Hierarchy Management—ability to generate organizational charts 9. Time/Date Stamped Notes—automatic time/date stamping for all notes **4.4 Student Service and Support Features and Requirements** 1. Case/Ticket Management—system provides a ticketing system for the creation, assignment, and resolution of student support issues. 2. Case Routing and Escalation Management—system provides customizable escalation management features to ensure high-severity student tickets are resolved quickly 3. Billable Time-Tracking—ability to monitor and track time spent on cases 4. Student Service Reports—ability to generate reports such as open cases, total cases created, closed cases, total cases created by agent, etc. 5. Student Service Dashboard—key metrics visualized with dashboard 6. Student web access to cases—ability for student to track case online 8. Student Self-Service Portal—system provides online self-service portal where students can login and access information, update account details, make payments, view order and shipping status, download support documents, etc. 9. Best practices knowledge base—students and support agents have online access to best practices with self-help documents and how-to guides

4. Scope of Work and Business Requirements	**4.5 Marketing Features and Requirements** 1. Campaign Management—the CRM system provides tools designed to track the return on investment for multi-channel campaigns. Campaign management features provide a simple interface for building, monitoring, and adjusting campaigns 2. HTML Email Marketing—system can send tracked HTML emails 3. Customizable Campaign Fields—the system is customizable and allows for an unlimited amount of campaign types to be entered and tracked. Specific fields for each campaign type can be created, modified, or removed. 4. Compliance with CAN-SPAM—system ensures adherence to CAN-SPAM 5. Student Segmentation and Profiling—the CRM system can segment students and prospects by demographic criterion 6. Student Survey Tools—the system can capture online/offline student survey data, or can easily be integrated into an existing survey system 7. Marketing Collateral Management—staff can easily retrieve all marketing collateral. There is no limit on the amount of document storage. 8. Campaign Response Metrics—all student/prospect responses from campaigns, such as click-through rates, can be reported on 9. Campaign ROI Measurement—all campaign-related expenses and revenues can be entered and reported on for campaign ROI analysis 10. Budget and Expense Monitoring—system tracks campaign budget/expenses **4.6 Sales Features and Requirements** 1. Sales Process Methodology—integration with sales process methodologies 2. Web lead capture—ability to integrate forms to capture/assign web leads 3. Territory management—system can automatically assign leads and accounts based on user-defined territory criteria such as geographic region, company, size, etc. 4. Contact Center Features—ability to record calls; provide call statistics and metrics, auto dial, integrate with current IP/PBX phone system. 5. Integration with Prospecting Tools—ability to integrate with lead generation prospecting tools and applications 6. Lead Management—system supports lead scoring, nurturing, assignment, re-assignment, qualification, activity reporting, prospect list building 7. Opportunity Management—system provides reporting on sales opportunity pipeline, can be customized to fit our sales stages and cycle. Provides weighted forecasting based on opportunity stages, win/loss reports, and identifies stalled opportunities 8. Sales Reports and Dashboard—provides high-level view of key performance indicators based on sales reports that can be rolled up or drilled down on. 9. Partner Relationship Management—ability to view partner sales funnels 10. Student Lifecycle Task Manager—tasks generated based on lifecycle
5. Vendor Information	Vendors must submit the following information to be considered: 1. Corporate Overview—legal name, year of incorporation, number of employees, income statement if available 2. Products and services—description of all products and services supplied 3. Markets served—description of geographic/industry markets served 4. Partners—list of technology partners and implementation partners (in regional area), and roles in the product's ecosystem

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6. Estimated Budget and Resources Required	All vendors must provide a breakdown of costs related to the implementation of their CRM system. Costs include, but are not limited to, hardware, software licensing, middle-ware, training, consulting services, integrations, data migration, documentation, etc. Vendor must agree to keep the quoted pricing in their proposals for a minimum of 90 days after proposal submission. Additionally vendors must provide options for deployment models, such as hosted, client server, or other model. Finally, all proposals must include a project schedule and work plan, which identifies timelines, key milestones, project phases, or other project information.

Publicly Available Sample CRM RFPs

1. Binghamton University, State University of New York
   http://www2.binghamton.edu/purchasing/crmrfpspeconly.pdf
2. Bowling Green State University
   http://www.bgsu.edu/downloads/finance/file67374.pdf
3. Minnesota State Colleges and Universities (MnSCU)
   http://www.academicaffairs.mnscu.edu/studentaffairs/documents/StudentMarketingCRMRFP2.pdf
4. Oregon State University
   https://secure.ous.edu/bid/system/attachments/262/original/WY157758P%20CRM%20System%20RFP.pdf?1326409048
5. Southern Utah University
   http://www.suu.edu/ad/purchasing/pdf/StudentRelationshipManagement.pdf
6. University of Maryland University College
   http://www.umuc.edu/visitors/corporate/upload/RFP-90979.pdf
7. University of Oregon
   https://secure.ous.edu/bapp/bopps/view/2928