


INVITATION TO BID		BID DUE DATE AND TIME
BOARD OF SUPERVISORS OF LOUISIANA STATE UNIVERSITY AND AGRICULTURAL & MECHANICAL COLLEGE		11/21/2023 11:00 AM CT
SOLICITATION RFQ-0000002074 SUPPLIER # SUPPLIER NAME AND ADDRESS <div data-bbox="180 394 792 604" style="border: 1px solid black; height: 100px; width: 100%;"></div>	RETURN BID TO lsubids@lsu.edu Buyer Jene Troxclair Ledet Buyer Phone Buyer Email jeneledet@lsu.edu Issue Date 10/23/2023	
TITLE: Software, Conversational Platform		
ADDENDUM 02: Notice is given to all parties that this Solicitation is amended by the University as stated herein. This Addendum is hereby made an official part of this solicitation. Supplier inquiries have been received and responses offered per the attached.		
<p style="text-align: center;">To Be Completed By Supplier</p> <ol style="list-style-type: none"> _____ "No Bid" (sign and return this page only). _____ My Company does not wish to receive future solicitations for this spend category. Specify your Delivery: To be made within _____ days after receipt of order. If applicable, Supplier's Addendum Acknowledgement/Response: As an authorized agent/signatory of the supplier, I/we acknowledge receipt of this Addendum, and _____ submit no alterations/clarifications to our original bid. _____ submit superseding revisions/clarifications to our original bid as written herein or attached hereto. <p style="text-align: center;">General Instructions to Suppliers</p> <ol style="list-style-type: none"> Sealed bids for furnishing the items and/or services specified are hereby solicited, and will be received by LSU Procurement at the "Return Bid To" address stated above, until the specified due date and time. Read the entire solicitation, including all terms, conditions and specifications. All bid information and prices must be typed or written in ink. Any corrections, erasures or other forms of alteration to unit price are to be initialed by the supplier. Bid prices are to be quoted FOB LSU/Destination and inclusive of any and all applicable shipping and handling charges unless otherwise specified in the solicitation. Any invoiced delivery charges not quoted and itemized on the LSU purchase order are subject to rejection and non-payment. Payment is to be made within 30 days after receipt of properly executed invoice, or delivery and acceptance, whichever is later. By signing this solicitation, the supplier certifies compliance with all general instructions to suppliers, terms, conditions and specifications; and further certifies that this bid is made without collusion or fraud. 		
SUPPLIER NAME	MAILING ADDRESS	
AUTHORIZED SIGNATURE	CITY, STATE ZIP	
PRINTED NAME	PHONE #	
TITLE	FAX #	
E-MAIL	FEDERAL TAX ID #	

Addendum 02 – Supplier Inquiry and Response:

Q1. Is there an existing app/system that needs to be updated or is a new app desired?

A1. There is an existing application/system in place, but our contract is nearing expiration.

Q2. Is Salesforce the desired platform for blasting emails?

A2. Salesforce is the current CRM. One to many email and SMS are sent using Salesforce Marketing Cloud. System must integrate with Salesforce for email and SMS blasts.

Q3. What kinds of reports are desired? Is there a desire for customizable reports?

A3. The “Requirement” section of the specification is hereby revised to add the following reports, per the updated “Requirements” document:

Engagement Metrics:

- Open Rates
- Click-Through Rates (CTR)
- Response Rates

Conversion Metrics:

- Conversion Rate
- Funnel Conversion Rates
- Lead Conversion Time
- Lead Quality Metrics
- Drop-off Points

Yes, there is a desire for customizable reports, as stated in section c of the Desired Capability section of the specifications.

Q4. What “off-the-shelf” functionality is desired?

A4. All required functionality is listed in the “Requirement” section of the specifications. All desired functionality is listed in the “Desired Capability” section of the specifications.

Q5. How many texts are expected to be sent on a daily, weekly, monthly, or annual basis?

A5. 350,000 annually.

Q6. How does the end user expect to use this application? What are the expected daily tasks? What reports are expected?

A6. Lead nurturing. Contacting leads to drive funnel conversion. Please see reports question above.

Q7. Is there an existing tech stack with any legacy code and is there a specific tech stack to be used for this project?

A7. There is no legacy code compatibility requirement. System must integrate with Salesforce.

Q8. My team and I are in the process of working on our projected partnership pricing. I have a few questions regarding how to price out upcoming years. What quantities would you like us to quote?

A8. All access requirements/quantities are listed in the ITB document.

Addendum 02 – REVISED REQUIREMENTS

Checklist of Supplier’s Capabilities

(Check under the “Yes” or “No” column to indicate if the requirement can be met by your company)

REQUIRED CAPABILITIES – mandatory requirements. These requirements must be available at no additional costs other than the prices quoted on the price sheet:

(Note: Indicating “No” in this section may be cause for rejection of the bid).

Requirement	Yes	No
AI lead conversion platform for lead nurturing of prospective students and shall integrate across multiple channels including email and text.		
Ability to do bidirectional integrations using enterprise tools.		
System quoted shall have the basic ‘off the shelf’ functionalities. However, the University also requires the system to be customizable, flexible, and scalable in order to build workflows for specific business process needs.		
<p>Supplier must be able to deliver the functionalities and services (described below as a-c) by a go-live date of 1/1/2024.</p> <p>LSU OCE has limited technical resources to meet the 1/1/2024 deadline for implementation. If this implementation cannot be achieved via the work of a functional end user, with no technical expertise and with no prior knowledge of the product, you must quote the implementation and training costs (even if implementation is required by a 3rd party partnership) on the implementation and training section of the price sheet (item number 2). All existing capabilities, journeys, and lead nurturing efforts currently in place in current system should be built out and fully functional by 1/1/2024 to avoid any interruption in service. <i>See Attachment A for more information.</i></p> <p>If supplier implementation is required, a comprehensive task list and timeline for implementation must be provided. If implementation can be provided via the work of an LSU OCE functional end user, you must provide a complete list of the number of resources needed along with a task list and timeline for those resources, which details how LSU OCE would implement. The Supplier may enter subcontracts with third parties for the performance of any part of the Supplier’s duties and obligations. In no event shall the existence of a subcontract operate to release or reduce the liability of the Supplier to the University and/or University Department for any breach in the performance of the Supplier’s duties. The Supplier will be the single point of contact for all subcontractor work.</p> <ul style="list-style-type: none"> a) Integration with Salesforce,(CRM of record, Marketing Email Automation Software of record, Marketing Reporting Software of record). b) Ability to support sending through SMTP >10,000 emails per day. c) All existing campaigns, skills, and functionality of current system available by 1/1/2024 (See Attachment A). <p>Can the requirements listed in “a-c” above be implemented via the work of a functional end user, with no technical expertise and with no prior knowledge of the product? If the answer is “no”, the implementation costs & training costs for LSU Online must be quoted on the price sheet (item 2).</p>		

<p>If any of the other listed requirements (other than a-c above) need implementation that cannot be implemented via the work of a functional end user, with no technical expertise and with no prior knowledge of the product, you must quote the implementation costs (even if implementation is required by a 3rd party partnership) for those requirements under the additional implementation cost section of the price sheet (item 3).</p> <p>If supplier implementation is required (for anything other than a-c above) a comprehensive task list and timeline for implementation must be provided. If implementation can be provided via the work of an LSU OCE functional end user, you must provide a complete list of the number of resources needed along with a task list and timeline for those resources, which details how LSU would implement. The Supplier may enter subcontracts with third parties for the performance of any part of the Supplier’s duties and obligations. In no event shall the existence of a subcontract operate to release or reduce the liability of the Supplier to the University and/or University Department for any breach in the performance of the Supplier’s duties. The Supplier will be the single point of contact for all subcontractor work.</p> <p>Can all other listed requirements (other than a-c above) that need implementation be implemented via the work of a functional end user, with no technical expertise and with no prior knowledge of the product? If the answer is “no” then the additional implementation costs must be quoted on the price sheet (item number 3).</p>		
<p>Ability to have one database for LSU OCE with three (3) AI profile instances and with cross selling between each as needed.</p> <ol style="list-style-type: none"> 1. Degree Programs (2) 2. Continuing Education 		
<p>Software centrally hosted in the cloud through the use of a subscription.</p>		
<p>MARKETING</p>		
<p>Support of university brand standards and specs. Must support customized prospect-facing content with marketing-approved colors, graphics, and images. See: https://itservice.lsu.edu/TDClient/51/OCUR/KB/?CategoryID=99</p>		
<p>User specific website tracking with the ability to identify CRM leads who interact with institutional websites.</p>		
<p>DUPLICATE RECORD MANAGEMENT</p>		
<p>Provide a tool accessible by non-technical users to identify and report potential duplicate records according to rules defined in the system.</p>		
<p>Allow records to be merged or deleted by non-technical users (with appropriate security access) via a graphical user interface.</p>		
<p>OTHER IT SPECS</p>		
<p>Support user ID and password security in a seamless integration with the University’s single-sign-on and authentication mechanisms which may include Shibboleth, Azure Active Directory (OAuth) or a SAML based SSO mechanism (via Shibboleth or AzureAD).</p>		
<p>Allow users and attendees to easily access recruiting details on a mobile device through a mobile enabled interface.</p>		
<p>Be available 24x7x365 with 99.99% uptime.</p>		

<p>LSU requires a train the trainer approach:</p> <ul style="list-style-type: none"> The implementation team would be trained to train other end users. This team would need training to cover an overview of all functionalities as well as the basic skills needed for implementation. <p>All other LSU OCE users would need access to web tutorials overviewing all functionalities.</p>		
<p>REPORTING</p>		
<p>Engagement Metrics:</p> <ul style="list-style-type: none"> Open Rates Click-Through Rates (CTR) Response Rates <p>Conversion Metrics:</p> <ul style="list-style-type: none"> Conversion Rate Funnel Conversion Rates Lead Conversion Time Lead Quality Metrics Drop-off Points 		