

REQUEST FOR INFORMATION

Customer Relationship Management (CRM) System for Undergraduate and Graduate TAMUSA-RFI-25-4008

PROPOSAL MUST BE RECEIVED ON OR BEFORE:

2:00 p.m. CST on August 15, 2025

Proposal response must be received by Texas A&M University, Procurement Services before the date and time specified for receipt of proposal as stated within Submittal Instruction referenced in Section 3.2 of this RFQ. After the due date and time, only the names of respondents will be made public.

All proposals shall become the property of Texas A&M University and the State of Texas upon receipt. Proposals may be subject to public review after contracts have been executed. Refer to Section 14.6 of Standard Terms and Conditions https://purchasing.tamu.edu/_media/TAMU.BID.TERMS.WEB.20250321.pdf for more information regarding confidential and proprietary information.

REFER INQUIRIES TO:

Patty Winkler, C.P.M.
Director
Texas A&M University
Procurement Services
email: p-winkler@tamu.edu

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SECTION 1
INTRODUCTION

1.1 Introduction

Texas A&M University–San Antonio is requesting information on vendor ability and interest in providing a Customer Relationship Management (CRM) system that supports both undergraduate and graduate recruitment and enrollment functions. Our current systems and workflows are fragmented, resulting in inefficiencies and inconsistent communication. A unified CRM will bring both undergraduate and graduate processes together, ensuring seamless integration and holistic management of the prospective student experience.

1.2 Brief History and Background

Texas A&M

Established in 1876, Texas A&M has since grown to become a world leader in teaching, research, and service, with an international reputation for excellence in both academics and athletics. With an enrollment of more than 70,000 students at the main campus in College Station, Texas A&M is the fourth largest among U.S. universities and one of the few universities to have land-, sea- and space-grant designations. With over 593,000 alumni, known as “former students,” the university is known for its commitment to developing leaders of character dedicated to serving the greater good.

Texas A&M University–San Antonio (TAMUSA) is a public, Hispanic-Serving Institution located on the South Side of San Antonio, serving a diverse student population. Established in 2009, the university enrolls approximately 8,000 students, with about 10% pursuing graduate degrees. TAMUSA offers more than 30 undergraduate and graduate programs and is committed to access, affordability, inclusive excellence, and preparing students for leadership in a global society.

1.3 Schedule of Events

The review and approval of RFIs is a multi-step process that requires variable amounts of time.

Responders are advised that the projected “Tentative Timetable” may require additional time than indicated.

Tentative Timetable

(Update as needed – may have additional steps – develop with the end user)

Deadline for Questions	July 28, 2025 @ 5:00 p.m. CST
Posting mailing Addendum and Response to Inquiries	August 1, 2025 @ 5:00 p.m. CST
Deadline for Receipt of Proposal.....	August 15, 2025 @ 2:00 p.m. CST
Evaluation of Proposals Completed.....	August/September

1.4 Scope of Work

Texas A&M University–San Antonio seeks information on vendor capabilities to deliver a CRM system that supports integrated undergraduate and graduate recruitment and admissions. The CRM must offer robust functionality in data management, communication workflows, reporting, and program-level customization. Vendors are asked to review the criteria grid below (See Exhibit B) and indicate whether each functionality is supported for undergraduate and/or graduate workflows. The information provided will assist the university in determining feasibility and cost of application.

Respondents shall submit descriptive literature and detailed specifications of product referenced within Exhibit B.

SECTION 2 GENERAL INFORMATION

3.1 Submittal Instructions

- 3.2.1 Proposals including Exhibit A – Company Profile must be signed by Respondent’s company official authorized to commit such proposals. Failure to sign the Exhibit A – Company Profile will be basis for proposal disqualification.
- 3.2.2 Complete proposals may be submitted either USPS, express mail or electronically utilizing the following electronic options. **Electronic submittals are preferred.** Electronic signatures are acceptable.

Option 1 AggieBid (<https://bids.scquest.com/apps/Router/PublicEvent?CustomerOrg=TAMU>) – One (1) electronic copy submitted via our electronic bid system. Respondents are required to register as a vendor within system. If you need assistance with vendor registration, please reach out to Jaggaer Supplier Support or call 800.233.1121.

Option 2 Email - One (1) Electronic Copy submitted via email to tamuaggiebid@tamu.edu with the subject line “TAMUSA-RFI-25-4008; Customer Relationship Management (CRM) System for Undergraduate and Graduate – paw”.

All electronic copies must either be in **Microsoft Office software or Adobe Portable Document Format (PDF)**. All image files must be in one of the following formats: .jpg, .gif, .bmp, or .tif. We prefer image files to already be inserted as part of a document such as a PDF.

- 3.2.3 An unreadable electronic copy due to incorrect format may reflect negatively on your proposal.

Late responses properly identified will be returned to Respondent unopened. Late responses will not be considered under any circumstances. Texas A&M shall not be responsible for failure of electronic equipment or operator error.

3.2 Question and Answer Period

Texas A&M specifically requests that Respondents restrict all contact and questions regarding this RFI to the TAMU Procurement Contract provided on cover page. **Deadline for questions is Monday, July 28, 2025 @ 5:00pm CST.** All questions and answers will be posted to the AggieBid site no later than the date specified within the Schedule of Events (Section 1.3).

3.4 Electronic State Business Daily Website

It is the responsibility of interested vendors to regularly check the ESBD for any possible addenda to this project. The RF is inclusive of all addenda issued.

<http://www.txsmartbuy.com/sp>

3.5 Proposal Components

The following documents are to be returned as part of your proposal submittal:

- ✓ Signed Exhibit A – Company Profile (See Section 6)
- ✓ Response to Scope of Work & Exhibit B (Section 1)
- ✓ Any Addendums, if applicable

EXHIBIT A**Company Profile**

Company Profile is to contain the following information in the order requested below and shall be limited to ten pages. Please provide name and signature below.

1. Firm/Business Name, Address, Telephone, Fax, and E-mail
2. Date Profile Prepared
3. Year Present Firm Established
4. Type of Ownership
5. Name of Parent Company, if any
6. Former Firm Name(s), if any
7. Names of not more than two Principal to Contacts to include title, telephone, and e-mail
8. Name/Title/Telephone/Fax/Email Address of single point of contact for proposed project team

Submitted by:

Name of Authorized Officer of Firm

Signature of Authorized Office of Firm

Date Signed

Respondents shall indicate below whether each functionality is supported for undergraduate and/or graduate workflows.

EXHIBIT B

Criteria Category	Requirement Description	Undergraduate	Graduate
Source Attribution & UTMs:	Track lead sources (digital ads, form submissions, clicking links) using GTM & UTM parameters to attribute conversions		
Deduplication Module:	Identify, review, and merge duplicate profiles using configurable rules and filters		
Deduplication Module:	The platform must support fuzzy matching algorithms to assess and rank the likelihood of duplicate entries.		
Territory Management:	Dynamically assign contacts to territories based on custom parameters, with precedence order controls		
AC Assignments	Ability to build automated Admissions Counselor assignments to student records		
AC Assignments	Ability to track TAMUSA staff activity		
Segments:	Define static or auto-updating segments based on profile data, form/app status, event attendance, behaviors, and more		
Segments:	Build segments with no code (gui based)		
Segments:	Ability to group segments into folders		
Workflows:	Triggered by events or segments, include delays and multistep automation (e.g., wait 3 days then send email) as well as logic (e.g. send email only to those who have test scores on record)		
Rules:	Immediate one-off actions triggered by events or data changes (no delays)		
Triggers:	Enrollment in workflows/rules may be initiated by a wide variety of actions—application started/submitted/completed, appointment scheduled/attended/canceled/no-		

Criteria Category	Requirement Description	Undergraduate	Graduate
	show, label added/removed, segment join/leave		
Automation Actions:	Apply/remove labels or tags		
Automation Actions:	Send emails/SMS		
Automation Actions:	Add to segments or territories		
Automation Actions:	Create tasks, reminders, update profile fields, enroll to journeys		
Page Builder:	Drag-&-drop editor for landing pages, form pages, microsites, and content pages with embedded RFI/tracking forms, social elements, maps, video, etc. Fully branded, no code needed (code optional)		
Forms & Applications:	Multi-step application forms including document uploads, payments, autosave, conditional logic, progress indicators		
Forms & Applications:	PDF generation of applications		
Forms & Applications:	Ability to query by different app types and dates for review of app submission data		
Forms & Applications:	Embed forms on external sites, integrated with tracking and triggers.		
Forms & Applications:	Ability to create multiple applications with different settings (app fee, app requirements, start date, end date, etc.)		
Forms & Applications:	Ability to take Application Fee payments		
Forms & Applications:	Fee Waiver Management		
Forms & Applications:	Ability to send App Fee emails to students who applied via Apply TX		
Forms & Applications:	Ability to track student application start, finished and submits		
Forms & Applications:	Ability to import/track Application Sources from banner (Common App, PSA, Apply TX, etc.)		
Forms & Applications:	Ability to have separate application sites that displays only certain applications		
Microsites:	Create secure, user-specific microsites at different student lifecycle stages (e.g., admitted student portal).		

Criteria Category	Requirement Description	Undergraduate	Graduate
Microsites:	Include custom content/data fields, dashboards, academic planners, and more		
Admissions Processing Wishlist	Specific incomplete application emails to students, including checklist item descriptions for clarity		
Admissions Processing Wishlist	A detailed app status portal to view all checklist items and statuses, contacts for the applicant's questions, etc.		
Admissions Processing Wishlist	A CRM that aligns with banner (system of record) correctly regarding counts, statuses, app types, terms		
Admissions Processing Wishlist	Application open and close date automation, as we currently open and close manually each term in Element		
Admissions Processing Wishlist	Submission prevention rules that help us stop incorrect apps being submitted		
Admissions Processing Wishlist	Easy integration with Banner with responsive vendor support		
Admissions Processing Wishlist	A test environment for application testing		
Event Management:	Build event pages (virtual/in-person), manage RSVP limits, recurring & series events.		
Event Management:	Ability for students to rsvp and change or cancel rsvp online		
Event Management:	Post-event surveys		
Event Management:	Custom Event Landing pages		
Event Management:	Streamlined Multi-person registration		
Event Management:	Automated event reminders and no show notifications		
Event Management:	Take event attendance through scanning of QR code		
Event Management:	Auto-generate virtual meeting links, track attendance, send reminders & follow-ups .		
Appointment Scheduling:	Native scheduling system integrated with workflows, appointment-based triggers (e.g., no-show = rule trigger), staff notes tracked via integrations		
Application & Decision Tools:	Ability to Keep Decisioning in Banner		

Criteria Category	Requirement Description	Undergraduate	Graduate
Application & Decision Tools:	Decision workflows with assignment queues, reviewer roles, comments, criteria, and trigger-driven communication		
Multi-channel Campaigns:	Email & SMS with drag-and-drop builder, dynamic content, advanced personalization, A/B testing, analytics		
Reporting & Insights:	Build dashboards—traffic, engagement, funnel trends, campaign performance, predictive modeling, attribution across sources .		
Integrations:	Native API/SIS connectors (Banner Ethos)		
Form Fields & Custom Data:	Full custom field management—native or custom; data storage across contacts, applications, microsites; use in segmentation, workflows, and reporting		
Role-Based Access Control:	Unlimited users with granular permissions per module, workflow, territories, applications, and data .		
Role-Based Access Control:	Ability to grant permissions to multiple TAMUSA staff to the same module/tool, but restrictions on editing each other's content.		
Compliance:	SOC 2 security controls, managed hosting, API security, data governance, 2FA		
Easy Build Scheduled Exports	Ability to easily create scheduled exports		
Easy Build Scheduled Import	Ability to easily create scheduled import		
Export to destinations	Export to Email, Clean Address, Banner (Ethos API), Power BI, flat file transfer		
Import Templates	Ability for us to create and save import templates for efficient importing		
Import Record Relationships	Ability to import records with student and parent data		
Import Record Relationships	The CRM should create both Student Record and the separate Parent Record and then link them with a student/parent relationship		

Criteria Category	Requirement Description	Undergraduate	Graduate
Historical Data	Ability to import historical data from current CRM		
Email Templates	Ability to easily create well designed email templates with no code.		
Email Click Tracking	Ability to know which links in emails were clicked and use this as a trigger to an automation or record value into a data field.		
Analytics	Ability to track Email/SMS engagement and analytics		
TAMUSA.edu Tracking	Ability to track student visits to our TAMUSA.edu webpages		
A/B Testing	A/B Testing		
Sync Custom Data Fields	Ability to connect to custom data fields from banner and display on record		
Create Custom Data Fields	Ability to create custom data fields and data sources (not linked dynamically to banner)		
App Decisions/Statuses	Ability to send emails/letters based on app decisions and statuses		
Enrollment Funnel Stages	Ability to track Enrollment Funnel Stage		
Tasks	Ability to create and automate the creation of tasks for employees with access		
Student Record Activity Tracking	Ability to easily track all activity of student (communications received, opened, events signed up for and attended, milestones, webpage visits, etc.) in one place.		
Group Data Fields on Student Record	Ability to create custom groups of data fields on student record		
Vendor Support	Vendor support from one helpdesk		
Vendor Support	Responsive support with ticket tracking (and expedited based on priority)		
Vendor Support	Robust Implementation Support		
Vendor Support	Ability to purchase customizations/feature requests		
AI Functionality	AI Recruiter		
AI Functionality	AI Application Reader		
AI Functionality	AI Appointment Prep Agent		
AI Functionality	AI Chatbot Agent		
AI Functionality	AI Generative Search		

Criteria Category	Requirement Description	Undergraduate	Graduate
AI Functionality	AI Lead Gen Agent		
AI Functionality	AI Admissions Advisor Agent		
AI Functionality	AI Financial Aid Advisor Agent		
AI Functionality	AI Athletics Counselor Agent		
AI Functionality	AI Campaign Creator		