Date: March 24, 2026

To: All Potential Bidders

Subject: Addendum No. 2 | Q&A

Bid: **RFP# 26-004 Customer Relations Management (CRM) Software**

OUTCOMES, GOVERNANCE, AND TIMELINE

1. What are the top 3 measurable outcomes you want to achieve in year 1 (e.g., inquiry-to-application conversion, speed-to-decision, yield, counselor productivity, marketing ROI)?

- Ultimately, we want to see improvements across the board in all the areas you mention, and more. Top three ranks would be: App-to-admit conversion, overall speed-to-decision, and admit yield.

2. Which business units and populations are in scope at go-live (Undergraduate, Graduate, Online, International, Military/Adult, Continuing Ed, etc.)?

- All units need to be ready to go live. Our EM division distinctions are: Undergraduate, Graduate, and International.

  - If you want a phased rollout, what is the priority order?
    - N/A

3. What is your target go-live date and what fixed milestones must be met (start of recruiting cycle, application open date, term start, major campaigns)

- Go-live will be an institutional decision and depend on a variety of factors affecting not just the EM and Marketing divisions, but also IT and perhaps other areas.

4. Are there institutional policies that affect project scope (data retention, communications opt-in/opt-out, accessibility, security approvals, procurement gates)?
   - That should be specified within the RFP document.

Current-State Systems and Scope of Replacement

5. Confirm current systems in use across the prospect-to-enrollment lifecycle (Ellucian Recruit, Colleague, web CMS, email/SMS tools, events tools, document management, analytics, call center/telephony, data warehouse)?
   - EM tools include CRM Recruit, Mongoose for SMS texting, Niche Engage video messaging, CampusESP parent communications, ZeeMee for peer-to-peer networking, Salesforce Marketing Cloud for email

6. Which capabilities must be replaced by the new solution versus kept as-is (and integrated)?
   - The new solution must include robust email campaigns and tracking, and analytics for enrollment and marketing purposes. Other capabilities will be assessed and decisions made on replacement vs. Integration.

7. What are the top 5 pain points with the current state that the new platform must solve?
   - Analytics, data visualization, email campaign management/attribution, overall marketing attribution, event/form management

8. Are there any business processes currently handled outside Ellucian Recruit (spreadsheets, shared inboxes, third-party forms) that must be brought into scope?
   - This is addressed in the RFP.

Unified Platform Expectations

9. The RFP emphasizes a unified platform rather than a loosely integrated stack. How will Troy evaluate compliance with this requirement?
   - This is addressed in the RFP.

10. Are embedded or natively integrated components acceptable if they provide a single user experience, consistent security, and a shared data model?
    - This is addressed in the RFP.

11. Are there any enterprise tools Troy requires we use (SMS, email, event management) that could constrain a unified architecture?
    - This is addressed in the RFP.

12. Do you require a single applicant portal experience for all populations, or can portal experiences vary by population/program?

- Portal experiences can vary by population (UG, GR, International, etc.).

Workload and Volume Inputs for Pricing

13. Please provide clarity on the following, does this apply to all functionality for both students and staff using the system:

Provide pricing based on institutional workload or volume (e.g., applications processed, enrolled students, or records managed) and not based on the number of named or concurrent users: This should be straightforward.

- If concurrent users are allowed pleas provide:

  - Number of system administrators:
    - TBD. At least two from EM and two from IT.

  - Number of full-time users:
    - Almost everyone within the EM division, plus others from across campus. Estimate 100.

  - Number of part time users:
    - N/A

  - Number of applicants:
    - 43,626 applications over the last calendar year for all 5 start terms. We expect applicant volume to grow.

  - Number of marketing contacts:
    - Included within full-time users.

  - Number of participants for events:
    - Varies.

  - Number of event users:
    - Included within full-time users.

  - Estimate annual email and SMS volumes (transactional vs marketing vs recruiter-initiated) and confirm whether two-way SMS is required.
    - Around 800,000 campaign emails sent March-March; around 1,000,000 one-off emails. Around 45,000 texts per month. Two-way SMS not required, but welcome. If two-way SMS is not a part of the platform, must integrate with our current partner.

Admissions Applications, Forms, Documents, and Payments

14. How many application types exist today (UG, Grad, Transfer, International, Online, Military/Adult, etc.) and how different are the workflows and requirements?
- Multiple applications, workflows are similar but requirements vary.

15. What conditional logic rules are required on the application (program, residency, citizenship, prior credits, military status, etc.)?
- We would want the ability to use conditional logic throughout all application types.

16. Are application fees required? If yes, what waiver rules exist and what payment provider(s) are preferred?
- Yes, fees are required.

17. What documents must be uploaded or collected (transcripts, test scores, recommendations, residency documentation, etc.) and what is the review/verification process?
- Transcripts, test scores, recommendation letters for some programs, additional forms for international applicants.

18. What decision workflow is required (review queueing, committee review, decision templates, conditional admits, deferrals, waitlist)?
- All of those workflows are required.

19. Do you require fraud prevention beyond basic phone/email verification (e.g., device fingerprinting, IP screening, identity verification services)?
- Fraud prevention within the CRM is not required, but we hope to see options. If the platform does not provide fraud prevention, it needs to be able to integrate with a third-party.

Communications, Personalization, and AI

20. What personalization is required (dynamic content, segmentation, journeys/nurtures, counselor-specific messaging)?
- Personalization should be available throughout all communication types.

21. Which AI use cases are required or desired (message drafting, summarization, next-best-action, segmentation, content recommendations)?
- None are required, all will be evaluated.

22. Are there restrictions on AI processing of student data beyond standard security/compliance requirements?

- This is included in the RFP.

Marketing Attribution and Analytics

23. Which web properties must be tracked (main site, admissions microsites, program pages, portals)?

- This is included in the RFP.

24. Which marketing channels must be included in attribution (paid search, social, email, events, web referrals), and do you require advertising cost ingestion for ROI reporting?

- This is included in the RFP.

25. What attribution model is required (first touch, last touch, multi-touch) and how should conflicting sources be handled?

- This is included in the RFP. The ability for multiple touch attribution should be available.

26. What dashboards/reports are mandatory for leadership (funnel, stage duration, channel ROI, counselor performance, geography/territory, program performance)?

- Dashboarding and data visualization should be available on a large scale.

Events, Travel, and Outreach

27. How many events occur annually and what types (open houses, virtual sessions, college fairs, high school visits)?

- 9-12 “Trojan Tour” open houses, 2 large scale “Trojan Days”, 2 “Admitted Student Days”, thousands of personal tours, hundreds of high school visits and college fairs, etc.

28. What does the ‘travel module’ need to do (territory planning, itineraries, visit outcomes, expenses, approvals)?

- Yes.

29. Do you require event registration and check-in (QR), attendance capture, automated follow-up communications, and post-event surveys?

- Yes.

30. Are event payments required for any event types? If yes, confirm payment requirements and refund/cancellation policies.

- Yes.

Integrations – Colleague and Other Systems

31. Confirm the specific Colleague data exchanges required bi-directionally (bio/demographic data, program/term, application status, decisions, enrollment, withdrawals).

- All of the above are required. We also are interested in one-way FA data flow (from Colleeague to the new system).

32. What is the preferred integration pattern (real-time APIs, event-driven, scheduled/batch)? What constraints exist on Colleague interfaces and your IT capacity?

- Real-time API integration managed by the vendor

33. Which additional systems must integrate (SSO/IdP, data warehouse, telephony, scholarship, financial aid status, housing, learning platforms)?

- None at this time

34. If any integrations must use SFTP/file exchange, do you expect the vendor to host and monitor the exchange and provide alerting/audit logs?

- Yes

35. Who is responsible for ongoing integration maintenance when upstream systems change (version upgrades, field changes, new processes)?

- Not Troy University; the award recipient will manage the proposed solution and any changes.

Data Migration – Ellucian Recruit and Legacy Sources

36. Confirm all source systems for migration (Ellucian Recruit and any supplemental sources).

- Migration from SFMC (email campaigns) and Mongoose (third-party SMS platform) may be needed.

37. Confirm history depth and number or records for each required for: prospects, applications, status history, communications, events, lead source/attribution, documents/attachments.

- How historical records will be imported (or not) into the new system is still being discussed. Over a given year, we may have around 200,000 prospect records, 40,000+ applications.

38. Are there known data quality issues (duplicates, inconsistent lead source codes, missing emails/phones) that must be remediated as part of the project?

- Possibly, efforts to address data hygiene exist, but ongoing errors are observed.

39. Communications and document migration may vary by technical feasibility—what is your minimum acceptable baseline for go-live?

- The system must be operable without any dependencies on existing solutions.

Commercial Terms and Bonding

40. Confirm desired contract term and renewal expectations (initial term and renewal options).

- The contract shall be for a term of one year with successive one-year renewal options not to exceed a total of five (5) years.

41. Confirm performance bond expectations: does it cover implementation plus subscription, and how should it be calculated for multi-year awards?

- The Performance Bond is calculated by the total annual contractual amount. The contract is for a single year, with the option to renew for 5 years. We will calculate the Performance Bond based on the single year's cost.

42. Confirm invoicing expectations (milestone-based vs time-and-materials, frequency, acceptance criteria).

- Any invoicing model may be used, this will have to be discussed further once the contract is awarded

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1. Can the University confirm whether its Ellucian Colleague environment is currently operating within the Ethos Integration framework?

- YES

2. Does Troy University prefer real-time API-based integrations, scheduled batch processing, or a hybrid model for CRM-to-SIS data exchange?

- Prefer real-time API based integrations

3. Does the University currently utilize or require the use of a specific middleware platform (e.g., Boomi, Informatica, custom integration layer), or should vendors assume direct integration with Colleague?

- Direct integration with Colleague

4. Does Troy plan to have a managed integration, meaning the integration is built and managed by the vendor (at cost)?

- Managed integration, built and managed by vendor.

5. Are there specific executive-level enrollment dashboards or year-over-year reporting metrics the University considers essential for the CRM to provide natively?
   - Not specific, but we expect the ability for a variety of dashboards and data visualization tools.

6. Does Troy require the ability for Institutional Research staff to directly access CRM data via reporting tools or data exports for downstream BI systems?
   - Not at this time.

7. Does Troy currently maintain a centralized data warehouse separate from Colleague?
   - No

8. Are there institutional reporting standards or BI tools (e.g., Power BI, Tableau) that the CRM must support?
   - Tableau is used minimally at this time.

9. Does Troy currently utilize website tracking or tag management systems (e.g., Google Tag Manager)?
   - Yes. TROY uses Google Tag Manager for centralized tag management and GTM integration with Google Analytics for website analytics. IT retains ownership of the accounts with Marketing, and partners designed by Marketing, provided with access to fully manage all activities within the containers, including tag configuration, triggering rules and publication.

10. How does the University currently track ROI or cost-per-acquisition for enrollment campaigns?
    - Manually with data from a variety of sources.

11. Has Troy identified specific fraud patterns (e.g., bot submissions, duplicate identities, FAFSA-related fraud)?
    - Regarding bot submission, yes. TROY has started a limited rollout of using a CAPTCHA system to prevent bot submissions to our current application system.

12. Is there a target go-live window for application hosting?
    - Go-live will be an institutional decision and depend on a variety of factors affecting not just the EM and Marketing divisions, but also IT and perhaps other areas.

13. How long does Troy anticipate running legacy systems in parallel?
    - This will involve EM and IT staff decisions, but we are anticipating the need for a long runway in parallel.

14. Should pricing assume replacement of Ellucian Recruit alone, or should vendors propose consolidated solutions that replace texting and marketing automation tools?

- Pricing should include replacement of CRM Recruit, and any options involving replacement of other tools will certainly be evaluated.

15. Is the performance bond required at finalist selection, or only upon contract award?

- The Performance Bond is required after award, before the contract is finalized.

16. Can the University provide further detail on how the 55-point “Operation Plan / Ease of Use / Services Offered” category will be evaluated?

- Evaluation will be a joint effort between university offices using the product and services selected.

17. If the University plans to invite finalists for oral demonstrations, what timeframe should we anticipate?

- We anticipate finalist presentations to occur very soon after the RFP closes.

18. When does the University expect to make its final vendor selection?

- Our team wishes to award before the end of June, but currently the award selection date is not fixed.

19. Will this purchase require board approval? If so, what are the approval steps and expected timing?

- The Board of Trustees will not be reviewing this personally. A panel of select Troy representatives will be reviewing each submission based on the evaluation points noted in the RFP. This could take a month or more depending on the volume of submissions. Demonstrations may be scheduled and would occur within that review period. The team wishes to award by the end of June.

20. What is the University’s target go-live window for the campus-wide student CRM?

- Go-live will be an institutional decision and depend on a variety of factors affecting not just the EM and Marketing divisions, but also IT and perhaps other areas.

21. Which outcomes would qualify as quick wins in the first 90 days (e.g., reduced staff load, higher application yield, faster response times)?

- Ultimately, we want to see improvements across the board. Top three rank for quick wins would be: App-to-admit conversion, overall speed-to-decision, and admit yield.

22. How many applications does the University use today (concurrent enrollment, undergraduate, graduate, etc.)? Is the preference to keep separate apps or use conditional logic within a single app?
- Multiple application types include undergraduate, graduate, dual enrollment, and international. Conditional logic within a single app or multiple applications are appropriate use cases.

23. Which recruitment/yield metrics do leaders track most closely today, and what custom reports would you want available out of the box?
- Year-to-year daily comparisons on funnel stage (inquiry/prospect/application start/application complete/admit/enroll) that can be sliced by term, academics, demographics, etc. is a major reporting need.

24. Which languages, besides English, are most commonly used at Troy University?
- Vietnamese, Hindi, Mandarin Chinese

25. For enrollment-based pricing, please confirm your current unduplicated headcount.
- Spring 2026 unduplicated: 11,700

26. Will Troy University accept the latest HECVAT full v.4 in lieu of the HECVAT lite?
- Yes.

27. Is a Vendor Disclosure Form needed when bidding, or is it only required for the awarded vendor?
- We prefer to have this submitted with the bid, but will accept it after award. This needs to be received before the contract is finalized.

28. Is E-Verify Documentation needed when bidding, or is it only required for the awarded vendor?
- We prefer to have this submitted with the bid, but will accept it after award. This needs to be received before the contract is finalized.

29. Please confirm the required number of hard copies and whether an electronic copy (USB or email submission) is required with the proposal submission.
- Please provide 2 hard copies of the proposal (only one needs to contain any original "wet ink" signed documents). The digital version of the proposal package is to be included on a USB drive. Including a digital version is not a requirement, but we would greatly appreciate its inclusion.

30. To ensure compliance with the University's evaluation process, should vendors provide a point-by-point response to each mandatory requirement outlined in Scope of Services Sections I–XIII, or should those requirements be addressed narratively within the Proposal Format Sections A–N?

- Each point in the scope of services should be addressed within section B of the proposal.

31. Section VII requires the solution to 'leverage artificial intelligence or advanced analytics to support communication personalization, including the use of recruiter-entered notes.' Will the committee provide additional detail on the intended scope of this requirement?
- No, bidder should provide extensive description of AI comms tools.

32. Specifically, does this include AI-generated message suggestions, next-best-action recommendations, or only personalization of content within existing templates?
- Yes, to both.

33. Beyond the predictive scoring referenced in Section VI, does the University envision the CRM's AI capabilities playing a role in staff workflow — for example, surfacing counselor task priorities, flagging at-risk applicants, or recommending optimal outreach timing?
- Yes.
- If so, is this considered in the 55-point 'Operation Plan / Ease of Use' category?
  - Yes

34. Section XIII restricts the use of University data for training AI or machine learning models without written consent. Does Troy University have a vendor AI governance framework or standards document that finalists are expected to comply with, or will this be addressed in contract negotiations?
- Yes, and it will be discussed further during contract negotiations.

35. Is the committee evaluating vendors' AI capabilities as part of the 55-point 'Operation Plan / Ease of Use / Services Offered' category, and if so, will there be a demonstration component where AI features can be shown in a live system context?
- Yes

36. Does the University currently utilize any AI-powered tools in its enrollment operations today (e.g., predictive modeling platforms, AI email tools, chatbots for prospect engagement), and if so, is the expectation that the selected CRM will replace, integrate with, or supplement those tools?
- We do not use any AI-powered tools currently. We are open to evaluating those.

37. To help us model ROI specific to Troy University, could you share baseline enrollment funnel volumes?

- Approximate number of outbound marketing prospects (students you actively reach through campaigns).
  - Around 150,000/cycle across all subsets.

- Approximate number of inbound engagement prospects (students who engage with you digitally or via events).
  - Around 85,000.

- Current number of applications (annual):
  - 43,626 applications over the last year (5 start terms).

- Current number of new enrollments (annual):
  - 7,485 new starts over the last year start terms.

38. To help us provide Troy University with a clear ROI model, could you share baseline figures for:

- Current prospect-to-application and application-to-enrollment rates?
  - This is most easily done for traditional recruitment: 12.4% prospect-to-app and 18% admit-to-enroll.

- Current retention rate used for enrollment forecasting?
  - 70% 1^{st}-to-2^{nd} year.

- Average tuition per enrolled student (or a proxy you'd like us to use)
  - $12,720 gross tuition/fees per enrollment per year (30 hours).

SCALE, DATA VOLUMES & SYSTEM SCOPE

1. What is the approximate total number of prospect/inquiry records currently in Ellucian Recruit, and how many years of historical data are in scope for migration?
  - There are several hundred thousand total prospect/inquiry records currently. How many years will be imported into the new system is still being discussed internally.

2. How many active applications are processed annually across all programs (undergraduate, graduate, online, international)?
  - 43,626 apps during last five start terms

3. How many distinct academic programs require separate application workflows or start-term configurations?
  - Nursing and many of our grad programs have distinct workflows.

4. Approximately how many total constituent records exist in the system today (prospects + applicants + enrolled students in pipeline)?
  - Pipeline for a given fall cycle could be around 150,000 total active records, with many more in the system for historical or future terms.

5. How many enrollment cycles (terms) does Troy run annually, and are there simultaneous active recruitment pipelines running at any given time?
   - We have three semester terms (fall, spring, summer) with two split online terms during the fall and spring semesters. All are active simultaneously.

6. What is the approximate annual volume of outbound email communications sent today (marketing + recruiter combined)?
   - Around 800,000 campaign emails sent March-March; around 1,000,000 one-offs

7. Is SMS messaging currently in use, and if so, what is the approximate monthly outbound SMS volume expected?
   - Varies, but around 45,000 SMS texts a month would be a starting point.

8. How many events does Troy host annually that would be managed through the CRM events module (on-campus, virtual, off-campus)?
   - 9-12 “Trojan Tour” open houses, 2 large scale “Trojan Days”, 2 “Admitted Student Days”, thousands of personal tours, hundreds of high school visits and college fairs, etc.

9. How many active advertising campaigns or channels are currently tracked for attribution (e.g., paid search, social, direct mail, third-party lead sources)?
   - We aim to track all active advertising channels through to full attribution, including but not limited to paid search, social media, direct mail, and third-party lead sources.
     However, we will not disclose specific details regarding the number or scope of currently tracked campaigns and channels at this stage of the RFP process. Additional information will be shared with finalists invited to the presentation phase.

USERS, ROLES & LICENSING

10. How many staff members will require full internal CRM access (recruiters, admissions counselors, marketing staff, administrators, IT/reporting users)? Please break down by role type if possible.
    - Almost everyone within the EM division, plus others from across campus. Estimate 100.

11. How many distinct internal user roles or permission levels are anticipated (e.g., recruiter, admissions reviewer, marketing manager, read-only reporting, system admin)?
    - 5-10. The more customization around roles/permissions available, the better.

12. Will external constituents (applicants, prospects, counselors) access a self-service portal? If so, what is the estimated peak concurrent external user population?
- Yes. Any given term could have 20,000 applicants, several hundred counselors.

13. Will high school counselors or third-party partners require their own portal access with differentiated views?
- We do not currently have that capability for high school counselors, but a counselor portal with a differentiated view would be welcome.

14. How many Troy campuses, divisions, or business units need to be represented as separate entities within the CRM (e.g., separate data visibility, reporting hierarchies, or branded communications)?
- We are "One TROY", but we expect the ability to heavily personalize our communications by academic program, college, campus, student type, funnel stage, etc.

15. Will any users require mobile app access in the field — e.g., recruiters traveling to high school visits?
- Mobile access is expected.

16. Does Troy anticipate needing dedicated integration/API users or service accounts for Colleague connectivity and any other system interfaces?
- Yes

17. The RFP requires pricing based on institutional workload or volume rather than named or concurrent users. Would Troy be open to evaluating a hybrid model where a defined set of power users (e.g., system administrators, senior recruiters, marketing leads) are licensed as named users, with broader staff access priced on a volume or role-based tier — provided the overall model delivers demonstrable cost efficiency?
- It would be considered, but preference is given to workload/volume pricing.

ELLUCIAN COLLEAGUE INTEGRATION

18. What version of Ellucian Colleague is Troy currently running, and is it cloud-hosted (Colleague in the Cloud) or on-premise?
- On Premise Colleague

19. Does Troy currently have the Ellucian Colleague Web API enabled and licensed?
- Yes

20. What specific data objects must flow from Colleague into the CRM in real time or near-real time (e.g., enrollment confirmation, registration, financial aid status, student ID assignment)?
- Financial aid status, enrollment, student ID, housing application marker

21. What data must flow from the CRM back into Colleague (e.g., application decisions, prospect records, admitted student data)?

- Admitted student data

22. Does Troy currently use any middleware or integration platform (e.g., MuleSoft, Informatica, Ethos Integration, Dell Boomi) for Colleague connectivity?

- Ethos Integration

23. Are there any other institutional systems beyond Colleague that require integration (e.g., financial aid system, housing, scholarship management, ERP, data warehouse)?

- We would like to see integration with Colleague on financial aid submission/award status, and with our housing application. We are not currently integrated with our scholarship platform, but that would be of interest with the new system.

24. What is Troy's tolerance for latency on Colleague data sync — is near-real-time (minutes) acceptable, or is true real-time (seconds) required for any specific workflows?

- True real-time is preferred.

25. Who on Troy's IT team will serve as the Colleague technical resource during integration design and testing, and what is their availability?

- Resource will be assigned, evaluated during project scope; however, the resource will not be available full-time or in an ad-hoc fashion.

GENERAL

26. Has funding been allocated for this initiative, and if so, can Troy share the anticipated budget range and whether it spans multiple fiscal years? Additionally, will this project be funded through capital budget, operating budget, or a combination of both, so vendors can appropriately structure implementation and subscription costs?

- Budget ownership/allocation is still being discussed internally. The project will be funded by annual operating budget.

27. What is Troy's fiscal year cycle and when do budget decisions get made?

- The Fiscal Year starts October 1st – and ends September 30th
- Most major Budget decisions are made in the spring semester between February and May.

28. What are key metrics that you are tracking and are focused on improving throughout this project?

- Application rates, admit yield, time to decision, etc.

29. Does Troy have a preference or requirement for a single consolidated invoice covering both software licensing and implementation services, or is Troy able to accommodate separate invoicing streams for licensing (vendor) and implementation (partner)?

- Either invoicing method should be fine.

30. Has Slate has been predetermined to win the RFP based on the updates made in the 2020-2025 Strategic Plan or is there an ability for another technology vendor who could afford better technology and a greater value?

- No, Slate has not been predetermined to win the RFP. The portion of the Strategic Plan you referenced is not in relation to the software solution that we are seeking in the RFP. Please let me know if you have any further questions regarding this matter."

MARKETING & CAMPAIGN SCOPE

31. How many distinct audience segments or student populations does Troy currently market to (e.g., by program, geography, demographic, lead source)?

- Campus modality (in-person or online), Troy campus and satellite campuses (2), undergraduate/graduate/doctoral, domestic/international, academic program "buckets", college, etc.

32. How many active automated communication journeys or drip sequences does Troy run today, and what is the anticipated number post-implementation?

- 7 distinct audiences for drip campaigns currently.

33. Does Troy require integration between the CRM and any paid advertising platforms (e.g., Google Ads, Meta, programmatic display) for audience sync and attribution?

- Yes.

34. What level of email template customization is required — fully branded custom HTML templates, or configuration of standard template frameworks?

- Full customization of branded HTML templates.

35. Will Troy require dynamic or personalized content within emails based on prospect data (e.g., program of interest, location, engagement score)?

- Yes.

36. Does Troy currently use or plan to use any third-party lead aggregators or inquiry sources (e.g., Niche, Common App, EAB, search vendors) that must feed into the CRM?

- Yes.

APPLICATION & FORMS

37. How many distinct application forms are required (e.g., undergraduate, graduate, online, international, readmission, certificate programs)?

- Distinct application types include undergraduate, graduate, international, and dual enrollment.

38. What documents are applicants required to upload as part of the application process, and are there program-specific document requirements?

- Test score reports and transcripts are standard, Nursing and graduate programs have program-specific documentation as well.

39. Does Troy require application fee collection within the CRM platform, and if so, what payment processor is currently used?

- Yes. PayPal and Heartland are used currently.

40. How many admissions reviewers or committee members will participate in application review workflows, and is there a committee review or scoring process?

- Varies by program.

41. Are there any graduate programs that require letters of recommendation, faculty review, or external evaluator portals?

- Yes, to all.

42. Does Troy require automated decision rules or decision-assist tools, or is all decision-making manual by admissions staff?

- We are interested in automation where available and feasible for our teams.

REPORTING, ANALYTICS & DATA GOVERNANCE

43. What are the primary reports and dashboards needed at go-live — does Troy have existing report specifications from Ellucian Recruit that should be replicated?

- No. Year-to-year daily comparisons will be important, as well as front-line user (recruiter) dashboards.

44. Does Troy require a connection to an external data warehouse or institutional research system for reporting purposes?

- This is not required but could be a possibility.

45. How many distinct reporting stakeholder groups will need access to dashboards (e.g., executive leadership, enrollment team, marketing, program directors), and do they require differentiated data views?

- Being able to differentiate dashboard views by stakeholders/access/portal types will be important.

46. Does Troy currently use any web analytics platform (e.g., Google Analytics, Adobe Analytics) on its university web properties, and is there an expectation that the CRM vendor will integrate with or replace that tracking capability?

- Yes. The university uses Google Analytics for web analytics via Google Tag Manager integration. GTM integration is expected for deployment of web analytics and advertising tags.

47. Will Troy require CRM Analytics embedded dashboards, or are standard reports and dashboards sufficient for initial go-live?

- We will not require any particular reports for go-live.

RECRUITMENT & ENROLLMENT MANAGEMENT

48. How do new prospective students learn about the university?

- High school visits, college fairs, visits to campus, campus events like Trojan Day, mailers, email, phone calls, texts, digital marketing, radio/commercial spots, website, etc.

49. What are some ways your prospective students can request more information from your University?

- Email, RFI forms, phone calls, office visits

50. Describe your lead capture process

- Lead capture predominantly done from RFI's on the website, or destination pages/microsites from digital campaigns.

51. How many Enrollment Counselors do you have? Is this role separate and different from the team that processes applications? (Admissions Team)

- Around 40 staff with a recruitment territory. This is separate from processors.

52. Is there a hand off to another department that services the student once the student is enrolled? (Advising? Student Success)

- EM handles the hand-off to IMPACT orientation for traditional students, or to Advising for online students.

53. Does your Enrollment Team have a contact strategy? (How do you prioritize who in your pipeline to contact, when, and how?)

- Yes, which we are looking to improve with the new system.

54. What is your current Telephony system used with prospective students? Is it integrated with your CRM? Is there a desire for integration?

- Phone integration along with SMS integration is welcome.

55. What identity verification tools are currently used (if any)?

- N/A, but we are looking at options.

IMPLEMENTATION READINESS & PROJECT GOVERNANCE

56. Can Troy provide a current-state technology inventory of all systems involved in or adjacent to enrollment management and marketing operations — including but not limited to email platforms, marketing automation, event management tools, website CMS, analytics/data warehouse, payment processors, telephony or dialer systems, and any existing Salesforce deployments anywhere within the university?

- CRM Recruit as the base CRM. SFMC for email. Mongoose for SMS text. Niche Engage for video messaging. Paypal/Hearland for payment processing. These are some of our current partners/systems.

57. What is Troy's target go-live date or first enrollment cycle the new CRM must support?

- Our internal teams have not established a specific go-live date. Getting it right is more important than rushing the implementation.

58. Does Troy have a dedicated internal project manager or CRM implementation lead who will own the project from Troy's side?

- There will be a dedicated internal implementation lead from the Enrollment Management division, and most likely a lead from the IT division responsible for the Colleague integration.

59. What is the expected availability of Troy's functional subject matter experts (enrollment, admissions, marketing) during the implementation — full-time, part-time, or limited?

- Heavy part-time availability.

60. Has Troy undergone a CRM implementation before in any department? If so, is there an existing org that this implementation must coexist with or connect to?

- Troy currently uses Ellucian CRM Recruit, and has had it for a while. Some legacy data will probably need to be imported from Recruit into the new system.

61. What is Troy's preferred approach to training — live instructor-led sessions, self-paced online, train-the-trainer, or a combination?

- A combination of all the above. Not 100% reliance on self-paced.

62. Does Troy have a defined data governance policy for duplicate management and record ownership, or will that need to be established as part of the implementation?

- Troy has a data governance policy and procedures in place for duplicate record management.

63. Are there any planned Ellucian Colleague upgrades, migrations, or IT freeze periods during the anticipated implementation window?

- We follow the suggested and required updates from Ellucian. No planned freeze periods.

SECURITY, COMPLIANCE & DATA GOVERNANCE

64. Does Troy require Single Sign-On (SSO) integration with an existing identity provider (e.g., Azure AD, Okta, Shibboleth) for internal staff access?

- No, identity management solution will be provided by the solution provider; no integration will occur with Troy University identity management solutions.

65. Will multi-factor authentication (MFA) be required at go-live for internal users, external applicants, or both?

- It is preferred.

66. Does Troy have existing data retention or purge policies for prospect and applicant records that must be enforced within the CRM?

- We follow State of Alabama Archive guidance. Currently, we do not purge any data from the CRM environment.

67. Are there any international student populations that would trigger GDPR, CCPA, or other regional data privacy compliance requirements within the CRM?

- International applications and marketing campaigns will be a part of this CRM.

TRAINING & CHANGE MANAGEMENT

68. What staff/resources do you have to define and deliver change management and/or training (internal / external)?

- 3 FTE to be heavily dedicated to the CRM, and many others that will be partially responsible for change management on their teams.

69. Who are the primary user groups that will be impacted by the change?

- Enrollment Management and Marketing, and some IT staff.

70. Based on your experience with previous changes, what kind of support or resources will each stakeholder group need to adapt successfully?

- Quality training from experts beyond self-study of a knowledge base.

71. Will Troy require a formal change management or training program as part of implementation, or is self-service training documentation sufficient?

- Self-service training alone is not sufficient.

72. What challenges did you face around enablement in previous changes that might resurface when implementing this change?

- Much of the admissions/EM staff were not in place when the previous CRM was implemented. An important part of implementing this change will include the ability to integrate seamlessly with our SIS system (Ellucian Colleague).

Scope of Services I ("Comprehensive Solution Requirement")

1. Will Troy University purchase any licenses - e.g., Salesforce licenses - directly from the vendor (i.e., Salesforce) or is it only looking to license resellers for this engagement?

- No, the provider will offer a complete solution; TROY will not purchase licenses or any other tool for this effort.

2. Can Troy University provide how many users are anticipated across Enrollment Management, Recruitment, Marketing, and Admissions across undergraduate, graduate, online, and other University-designated programs? Please provide the number of Troy staff users and the estimated number of portal users (i.e., prospective students, applicants, and accepted students).

- Estimate of 100 users across EM and Marketing. Recruiters, executive team members, prospective students, applicants, enrollees, high school counselors are examples of portal user groups.

3. What KPIs / metrics are you looking to achieve with this engagement? How do you define success at the end of the project?

- Success will include application pool growth, admit pool growth, speed-to-decision improvement, yield rate improvement, and overal enrollment improvement.

4. Does Troy University currently use Salesforce? If so, which clouds and how many orgs?

- We currently use Salesforce Marketing Cloud for email. However, that environment is a shared space with other departments; the product will not be available for this new effort.

5. Should the solution account for prospective and current students outside of undergraduate and graduate programs (e.g., professional education)?
   - Yes.

Scope of Services Section II ("Technical, Platform, and Security Requirements")

6. Can Troy University give further insight into its desire to pay for institutional workload/volume vs. number of named or concurrent users?
   - This desire is included in the RFP.

7. Scope of Services III ("Data Integration Architecture Requirements")
8. Can Troy University provide more detail on specific integration points required with existing systems?
   - This is in the RFP.

9. Are there any specific third-party tools currently in use that need to be integrated with the new CRM (in addition to Ellucian)?
   - We will evaluate that once we know what capabilities the new CRM will have.

10. Do you have an enterprise integration tool, such as Boomi or MuleSoft?
    - No. The vendor must provide and manage all integration tools.

11. Does the proposed solution need to include payment processing (e.g., application fees, enrollment deposits)? If so, which vendor is currently used for payment processing?
    - Yes. PayPal/Heartland

12. Does Troy University have a data warehouse available?
    - Not for this effort.

Scope of Services Section IV ("Data Migration Requirements")

13. Can Troy University give insight into the size of the data (in terms of volume of records) that needs to be migrated to the new CRM?
    - Discussions are being had internally regarding what historical data, if any, should be imported from the old CRM into the new. Depending on how many years we go back, there could be hundreds of thousands of inquiries/applications.

Scope of Services V ("Identity and Account Lifecycle Management")

14. How is single sign on ("SSO") currently being managed? What platform is used as identity management ("IdP")?
    - The vendor must provide and manage an identity management platform for this solution.

Scope of Services VI ("Prospect, Marketing, and Recruitment Management")

15. Is Salesforce Marketing Cloud in use today? If so, to what extent?

- Yes, for all HTML email sends.

16. Which platform are Troy University web properties hosted (e.g., Drupal)?

- Troy University's primary web properties for external audiences are hosted within a Modern Campus CMS environment. Additional web properties, such as the University blog, are maintained in WordPress (Pressable).

17. Approximately how many web pages are currently available?

- The University maintains a large and dynamic web presence consisting of several thousand pages across its domains. A more detailed page count and site architecture overview can be provided to finalists during the presentation phase.

Scope of Services VII ("Communication, Personalization, and Engagement")

18. What is the annual expected volume of emails sent? Annual volume for SMS?

- Around 800,000 campaign emails sent March-March; around 1,000,000 one-off emails. Around 45,000 texts per month.

19. Please provide any guidance on approved usage of artificial intelligence.

- Troy University requires that all proposed solutions comply with applicable institutional, State of Alabama, and Federal policies governing data governance, privacy, and security. Vendors should review and adhere to Troy University's Information Technology policies, including Section 810, available at: https://www.troy.edu/about-us/offices-departments/information-technology/policies/section-810.html

- Troy University will permit the use of artificial intelligence (AI) capabilities within proposed solutions, provided that such use complies fully with all applicable Troy University policies, as well as all State of Alabama and Federal laws, regulations, and guidance related to data privacy, security, and ethical use of technology.

- Vendors must ensure that any AI functionality included in their solution adheres to established cybersecurity, data governance, and privacy requirements, including but not limited to FERPA and applicable federal data protection standards. The use of University data for training, model development, or any purpose outside the direct delivery of contracted services must not occur without explicit written authorization from Troy University.

- Additionally, vendors must certify that their proposed solution does not incorporate, rely upon, or integrate technologies, components, or services that are restricted or prohibited under applicable federal guidelines, including those identified in Department of Defense banned or restricted technologies lists (e.g., Section 889 of the National Defense Authorization Act and related federal supply chain security restrictions).

- Vendors are responsible for clearly identifying all AI capabilities within their proposed solution and describing the data sources, processing methods, and safeguards associated with those capabilities.

- While Troy University continues to mature its formal governance framework around artificial intelligence, vendors should assume that all AI-enabled functionality must adhere to existing University standards for data protection, ethical use, and security. The use of institutional data, including student and prospect data, for AI model training or any purpose outside the direct delivery of contracted services is prohibited unless explicitly authorized in writing by the University.

- All solutions must comply with applicable federal regulations, including but not limited to FERPA, GLBA, and other relevant data protection requirements. Vendors must also ensure alignment with applicable State of Alabama data security and procurement regulations.

- With respect to data governance, vendors must support:
  - Secure handling and storage of student, applicant, and prospect data.
  - Role-based access controls and auditability of data access and changes.
  - Data minimization and appropriate retention practices.
  - Clear data ownership, with Troy University retaining exclusive ownership of all institutional data.
- Regarding data residency, vendors should clearly identify where all data will be stored, processed, and backed up, including any use of subcontractors or cloud service providers. Solutions should prioritize data hosting within the United States unless otherwise approved by the University.

- Vendors must also certify that their solution does not utilize or depend upon technologies restricted under applicable federal guidance, including Department of Defense and federal supply chain security restrictions.

- Vendors are expected to fully disclose their data governance model, including how data is collected, processed, stored, protected, and ultimately returned or destroyed at the conclusion of the contract.

Scope of Services VIII ("Admissions, Applications, and Forms")

20. How many application templates are currently in use?

- 4

21. How many applications are currently processed on an annual basis?

- 43,676 total apps over last five (annual) start terms.

22. How many different academic terms are currently supported?
- Fall/Spring/Summer semesters, and two split terms for fall and spring.

Scope of Services IX ("Events, Travel, and Outreach Management")

23. Please provide more details concerning the event management functionality Troy University requires within the CRM.
- Ability to host registration for multiple tours/events, have pre-, post-, and day-of communications, survey participants, check in via mobile, etc.

Scope of Services Section X ("Data, Analytics, Reporting, and Integrations")

24. Does Troy University currently use an analytics platform, such as Power BI or Tableau?
- Troy uses both; however, those will not be available for this project. The vendor must provide their own reporting tool, reporting environment, and manage the tools and environment.

Scope of Services XII ("Project Governance and Implementation Requirements")

25. Does Troy University have a desired Go-Live date for the new CRM? What is the preferred timeline for implementation, and are there any critical deadlines?
- No specific target deadline.

26. Does Troy University anticipate needing any change management / training associated with the implementation of a new CRM? If so, does it prefer in-person training, virtual training, train-the-trainer, etc.?
- A mix is important, not just reliance on self-study.

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1. Is there an option to submit a response to the RFP electronically, via a portal or email?
- The proposal package must include 2 physical copies delivered to the Purchasing Department prior to the Opening on March 31st at 2pm CST. A digital copy on a usb drive is requested but not required. A copy of the proposal documents can be sent via email as well, *in addition to the physical package,* after the Opening.

2. Has Troy University discussed this potential acquisition with vendors and/or seen demonstrations of products prior to issuing this RFP? If so, can you provide a list of those vendors?
- No.

3. Can you confirm that Ellucian Recruit is the current CRM and that this solution will replace Ellucian Recruit?
    - Yes.

4. Can you provide details on the number of staff members requiring system access and their specific roles (e.g., system administrators, full-access users, or users with limited functionality like application reviewers)?
    - Estimate of 100 users across EM and Marketing, with a variety of roles.

5. In the Scope of Services, section II. "Technical, Platform, and Security Requirements" of the RFP document states: "The vendor shall: Provide pricing based on institutional workload or volume (e.g., applications processed, enrolled students, or records managed) and not based on the number of named or concurrent users." Will you accept proposals from vendors that price some components of the solution based on the quantity of user licenses required?
    - Yes, with proper explanation of the license options.

6. Approximately how many applications does Troy University receive each year?
    - 43,626 total apps over the last five start terms.

7. Will it be necessary to import application data into the CRM? If so, where will that applicant data originate?
    - Application hosting should be part of the CRM.

8. Does Troy University want the ability to accept and process application fees or other payments within the system? If so, does Troy University currently use a payment gateway?
    - Yes. Currently use Paypal/Heartland.

9. Would Troy University be interested in providing non-credit students the ability to register for and purchase classes, certifications, micro-credentials, etc., through a shopping cart type experience?
    - Maybe.

10. Related to the communications requirements:
    - Do you currently have texting and email tools that you use related to marketing communications? If so, can you provide those systems and would you prefer to continue using those tools with the new system or replace them altogether?
        - Mongoose is our current SMS platform. Salesforce Marketing Cloud is the current email tool. The new CRM should at minimum replace SFMC.

- Approximately how many unique email addresses (contacts) does Troy University include in email campaigns annually?
  - Around 300,000 annually, with expectations of growth.

- On average, how many active contacts would you estimate that the Troy University has each month? These would be individuals that you would expect to receive at least one email or one SMS message during the month.
  - For our big starts (fall/spring), we'll have around 100-200k prospects that generate 100k inquiries and 20k applications.
- Can you provide separate estimates of the quantity of both emails and texts that you would expect to send in a year?
  - Around 800,000 campaign emails sent March-March; around 1,000,000 one-off emails. Around 45,000 texts per month.

11. Related to the integration requirements with Ellucian Colleague, can you provide additional details related to the data fields that you expect to pass from Ellucian Colleague to the CRM and from the CRM to Ellucian Colleague?
- Demographic data, application stage, admit status, academic program, start term, enrollment status, etc.

General

1. Was any consultant and/or subcontractor involved in a pre-RFP assessment and/or assisting in preparing the RFP?
- No.

2. Will any consultant and/or subcontractor who performed a pre-RFP assessment and/or assisted in writing the RFP be eligible to respond to the RFP?
- N/A

3. Will any consultant and/or subcontractor be involved in the decision-making and/or awarding process of this RFP?
- No.

4. Is an incumbent consultant and/or subcontractor already providing similar Salesforce services to Troy University? Will that consultant and/or subcontractor be eligible to respond to this RFP?
- There is no incumbent consultant/subcontractor.

5. Will any on-site meetings or duties be required?

- Possibly.

6. Can you share the titles /roles of the decision makers for awarding this RFP?

- The heads of IT and Enrollment Management & Admissions will be the main decision makers assessing the viability of submissions. They will have a panel of select members from each of their departments reviewing as well.
  - William Price – IT
  - Charles Bedsole - Enrollment Management & Admissions

7. What budget has Troy University established for this initiative?

- Budget is still being discussed internally.

Strategy, Scope, and Prioritization.

8. The RFP mentions "Enrollment Management, Recruitment, Marketing, and Admissions" as in-scope. Does the University have a preference for a phased onboarding approach (e.g., by academic level or campus), or is a simultaneous "big-bang" deployment required for all departments?

- Go-live should include all functionality.

9. Please clarify what is included in "other University-designated programs" to ensure our implementation plan and project governance model account for the correct number of stakeholders.

- Senior leadership, marketing/communications, IT, and IR could be other university-offices outside of Enrollment Management that would be considered stakeholders.

10. To what extent are recruitment and admissions processes currently standardized across the various colleges and campuses (Undergraduate vs. Graduate vs. Online)?

- Undergraduate processes are somewhat standardized for in-person and online. Graduate programs all have different requirements/workflows, as do Nursing programs.

11. How do you define "seamless environment" for administrative users? Are you expecting a single login (SSO) and shared navigation menu across all recruitment and marketing functions?

- Currently, users employ a collection of disparate tools. The new solution will be unified and accessed from within a single, navigable interface. All identify management solutions will be managed and provided by the bidder.

Data Migration and Integration

12. To accurately scope the "structured data migration plan", can the University provide estimated record counts for:

- Active and historical prospect records? We are still determining how many records (from how far back) we want to migrate.
  - Anticipate 200-400k.
- Specific formats (e.g., HTML, plain text, activity logs) they are currently stored in?
  - Most likely plain text.
- Associated documents, attachments, and their total storage volume (GB/TB)?
  - Document imaging has been done in a different system (not the CRM) so this should not be an issue.

13. Beyond the "student status changes" mentioned in Section X , are there specific financial aid, housing, or transcript data objects that the University requires to sync in real-time versus batch?

- Proposals including real-time updates on FA objects (like ISIR submission, award status, etc.), housing application submission, and transcript receipt/review would be welcome.

14. Does the University currently utilize an enterprise document management system (e.g., ImageNow/Perceptive) that must integrate with the CRM for "document upload and review", or should we propose a native cloud-based storage solution?

- You are welcome to propose a native storage solution. Otherwise, you will need to integrate with what we have.

Marketing and Communication Fulfillment

15. What specific tools are currently being used for marketing automation and mass email communications today?

- Salesforce Marketing Cloud is used today.

16. To assist with licensing and scalability estimates, how many "emailable" contacts are currently in the legacy environment?

- Several hundred thousand, variable based on how far back we want to migrate over.

17. For the implementation of "automated marketing", how many unique email journeys and branded templates does the University anticipate needing at launch?

- We have 7 distinct campaign journeys at the moment. We should have at least that many as well as total customization of branded templates with the new system.

18. Regarding the "auditable record of all communications", does the University currently utilize an external mail house or automated "print-to-mail" service that requires technical integration, or is the requirement focused on the manual generation and logging of documents?
    - The University currently utilizes an external mail house, with scheduled manual data pulls to support mailing activities. Communications related to print and mail are coordinated through this process rather than through a fully automated "print-to-mail" service requiring technical integration. However, a more automated solution would be ideal.

      Additionally, our intent is to establish a centralized, accessible repository of communications across channels that can be referenced by stakeholders. We are open to all solutions. Additional details can be provided to finalists during the presentation phase.

Application and Payment Processing

19. **Application Volumes:** What is the annual volume of applications processed across all programs to help us right-size the platform workload?
    - 43,626 total apps processed over the last five starts (calendar year).

20. **Payment Gateway:** For the "secure collection of applicable fees" , does the University have a preferred PCI-compliant payment provider (e.g., TouchNet) that must be integrated into the application workflow
    - Currently use Paypal/Heartland.

Procurement & Vendor Structure

1. **Contracting Model:** Will Troy University contract directly with the CRM software provider for licensing and hosting, with the implementation partner contracted separately? Or is the expectation that the awarded vendor provides both software licensing and implementation under a single contract?
    - This should be covered in the RFP.

2. **Prime Vendor Expectations:** If a single prime vendor is required, are formal partnerships between the CRM provider and an implementation partner acceptable within the proposal structure?
    - Yes.

3. **Existing Platform Relationships:** Does Troy currently maintain enterprise agreements with any CRM vendors (Salesforce, Microsoft, Slate, etc.) that may influence procurement, licensing, or implementation requirements?
    - None of those agreements will influence.

4. **Evaluation Weighting:** Can you share how proposal evaluations will be weighted across platform capabilities, implementation approach, higher education experience, and cost?
   - This is covered in the RFP.

CRM Platform & Architecture

5. **Interpretation of "Unified Platform":** The RFP references a preference for a unified CRM platform rather than loosely integrated systems. Would a single-vendor ecosystem with multiple native modules operating on a shared data model satisfy this requirement?
   - Potentially.

6. **Marketing Capabilities Expectations:** Are marketing automation capabilities and data tracking expected to be native within the CRM platform, or is integration with a marketing automation solution acceptable if it shares data natively?
   - It is desired to be native.

7. **Communications Channels:** Should the CRM platform support email, SMS, recruiter notes, call logging, and campaign automation within the same environment, or are integrated communication services acceptable?
   - At a minimum, email and campaign automation should be native.

8. **Data Warehouse:** Does Troy have a current CDP or Data Warehouse that the vendor needs to connect to, or will there be an appetite to incorporate one in the future? Should the vendor make potential recommendations for a CDP solution?
   - The vendor should provide such, if needed, for their solution. TROY will not provide access to a data warehouse or reporting environment.

Integration Environment

9. **Ellucian Colleague Integration:** Does Troy currently utilize APIs, middleware, or batch integrations when connecting systems to Ellucian Colleague?
   - API's

10. **Integration Ownership:** Will Troy IT provide existing data dictionaries, integration documentation, and API access for Colleague and related systems, or should vendors assume integrations must be developed from the ground up? The vendor must provide and manage all integrations.
    - IT can provide API access for Colleague. If the integration does not exist between Ellucian that the vendor, the integration must be developed from the ground up.

11. **Middleware Environment:** Does Troy currently operate an enterprise integration layer (such as MuleSoft, Boomi, or another iPaaS) that new systems must integrate through?
    - No; Troy utilizes Ellucian Ethos.

12. **Identity & Authentication:** Which systems currently manage single sign-on (SSO), identity management, and role-based access controls for student and staff systems?
    - The vendor must provide and manage all identity management solutions; integrating with TROY's identity management solutions is not part of the project.

Data Migration

13. **Current CRM Footprint:** Beyond Ellucian Recruit, are there additional systems currently storing inquiry, applicant, marketing engagement, or enrollment-related data that would require migration?
    - No.

14. **Historical Data Scope:** Is the expectation to migrate only active prospects and applicants, multiple years of historical data, or the complete historical record?
    - Somewhere between multiple years and complete.

15. **Communications History:** Should historical email and SMS communications be migrated into the new system, or is archival access to legacy systems acceptable?
    - These discussions are ongoing internally.

16. **Document Migration:** Are application documents, attachments, transcripts, or other applicant files stored within Ellucian Recruit today and expected to migrate into the new platform?
    - These discussions are ongoing internally.

Marketing & Enrollment Operations

17. **Current Marketing Technology Stack:** What marketing platforms currently support recruitment and enrollment marketing activities today?
    - Salesforce Marketing Cloud for email, Mongoose for SMS texting, Niche Engage for video messaging, CampusESP for parent communications.

18. **Attribution Measurement:** How does Troy currently measure marketing attribution across campaigns, inquiries, applications, and enrollments?
    - Through manual work involving multiple data sources.

19. **Lead Scoring & Segmentation:** Are there existing lead scoring models, segmentation frameworks, or audience definitions used by the enrollment marketing team today?
    - Yes.

Implementation Expectations

20. Implementation Timeline: Does Troy have a target go-live timeline tied to a specific admissions or enrollment cycle?
- No.

21. Internal Implementation Resources: Which internal teams will participate in the implementation (e.g., enrollment operations, marketing, IT, institutional research)?
- EM, marketing, and IT.

22. Change Management: Has Troy previously implemented a CRM or enterprise system that required significant operational changes across enrollment or marketing teams?
- Our current CRM was implemented many years ago.

23. Creative & Branding Assets: Does Troy require creative assistance with templates, ongoing imagery sourcing and ongoing copywriting for their various CRM channels?
- No creative assistance is needed.

24. Journey Strategy & Development: Does Troy currently have completed CRM journeys for their various audiences? Would these journeys need any assessment, optimization or ongoing expansion?
- Other than the inital buildout in the new system, no.

25. Training Expectations: What are the training expectations for the CRM platform? Will Troy have a need for ongoing training services or will there be a single point of contact for learning?
- There should be a mix of training led by experts and self-study.

Security & Compliance

26. Security Review Process: Will vendors be required to complete the HECVAT Lite during the proposal submission stage or after vendor selection?
- Vendors must submit the HECVAT Lite with their proposals

27. Data Governance Policies: Are there specific institutional policies related to AI usage, student data governance, or data residency that vendors should account for when designing solutions?

- Troy University requires that all proposed solutions comply with applicable institutional, State of Alabama, and Federal policies governing data governance, privacy, and security. Vendors should review and adhere to Troy University's Information Technology policies, including Section 810, available at: https://www.troy.edu/about-us/offices-departments/information-technology/policies/section-810.html

- Troy University will permit the use of artificial intelligence (AI) capabilities within proposed solutions, provided that such use complies fully with all applicable Troy University policies, as well as all State of Alabama and Federal laws, regulations, and guidance related to data privacy, security, and ethical use of technology.

- Vendors must ensure that any AI functionality included in their solution adheres to established cybersecurity, data governance, and privacy requirements, including but not limited to FERPA and applicable federal data protection standards. The use of University data for training, model development, or any purpose outside the direct delivery of contracted services must not occur without explicit written authorization from Troy University.

- Additionally, vendors must certify that their proposed solution does not incorporate, rely upon, or integrate technologies, components, or services that are restricted or prohibited under applicable federal guidelines, including those identified in Department of Defense banned or restricted technologies lists (e.g., Section 889 of the National Defense Authorization Act and related federal supply chain security restrictions).

- Vendors are responsible for clearly identifying all AI capabilities within their proposed solution and describing the data sources, processing methods, and safeguards associated with those capabilities.

- While Troy University continues to mature its formal governance framework around artificial intelligence, vendors should assume that all AI-enabled functionality must adhere to existing University standards for data protection, ethical use, and security. The use of institutional data, including student and prospect data, for AI model training or any purpose outside the direct delivery of contracted services is prohibited unless explicitly authorized in writing by the University.

- All solutions must comply with applicable federal regulations, including but not limited to FERPA, GLBA, and other relevant data protection requirements. Vendors must also ensure alignment with applicable State of Alabama data security and procurement regulations.

- With respect to data governance, vendors must support:
  - Secure handling and storage of student, applicant, and prospect data.
  - Role-based access controls and auditability of data access and changes.
  - Data minimization and appropriate retention practices.

- Clear data ownership, with Troy University retaining exclusive ownership of all institutional data.

- Regarding data residency, vendors should clearly identify where all data will be stored, processed, and backed up, including any use of subcontractors or cloud service providers. Solutions should prioritize data hosting within the United States unless otherwise approved by the University.

- Vendors must also certify that their solution does not utilize or depend upon technologies restricted under applicable federal guidance, including Department of Defense and federal supply chain security restrictions.

- Vendors are expected to fully disclose their data governance model, including how data is collected, processed, stored, protected, and ultimately returned or destroyed at the conclusion of the contract.

Strategic Context

28. **Drivers for Change:** What were the primary limitations or challenges with Ellucian Recruit that led to issuing this RFP? What are Troy's current top pain points in their CRM program?
    - Desired characteristics of the new system are included in the RFP.

29. **Success Criteria:** From the university's perspective, what outcomes would define a successful CRM implementation one year after go-live?
    - Improved prospect-to-app, app-to-admit, and admit-to-enroll rates, improvements in time-to-decision, and overall enrollment growth.

30. **Stakeholder Priorities:** Which internal stakeholder groups will have the greatest influence in the final platform selection and implementation decision?
    - EM, Marketing, and IT

31. **Inspiration:** Are there any competitive brand CRM programs that you find inspiring either within your industry or outside of your industry?
    - We have seen colleagues with interesting use cases that are on a variety of CRM platforms, including Slate, Element451, EnrollmentRx, and Salesforce.