

Consideration of Approval to Contract for Customer Relationship Management Solution

ADMINISTRATION RECOMMENDATION/REPORT

The administration recommends that the Board of Trustees approve a contract with TargetX for a Customer Relationship Management (CRM) solution for the College.

BACKGROUND

Among the priorities in the San Jacinto College Strategic Plan 2019-2024, is the transformation of our advising systems to a technology-mediated advising model to support a more intensive and personalized case management model. Within the Title V grant, the College proposed to improve student and faculty communication with a CRM solution with the ability to assign advisors based on pathway, manage early alerts and interventions, implement a student communication plan, connect students to the appropriate resources/staff members, and manage prospects and applicants through the enrollment funnel.

Request for proposals #22-04 was issued on February 16, 2022, to procure a CRM solution. Nine (9) responses were received and evaluated by an evaluation committee comprised of representatives from grants, instructional departments, ITS, marketing, and student services. Negotiations began with the highest ranked firm, but it was determined their proposed solution would not address all of the College's needs. Negotiations ceased and the committee engaged with the second ranked firm, TargetX. The solution proposed by TargetX utilizes and will be incorporated with a separate software platform, Salesforce, which the College will procure separately.

IMPACT OF THIS ACTION

An institutional CRM will allow the College to use one platform to track and personalize student communication, bridge the gap between faculty and staff advising notes, and use just in time interventions based on data points.

BUDGET INFORMATION (INCLUDING ANY STAFFING IMPLICATIONS)

The total expenditure for the initial three-year term is \$770,000. Year one, including implementation, is \$340,000 and will be funded from the HEERF grant. Future year expenditures are \$215,000 per year, to be funded by the institutional unrestricted budget of subsequent years.

MONITORING AND REPORTING TIMELINE

The initial three-year award term will commence on or after June 7, 2022, with renewal options of two (2) one-year terms.

ATTACHMENTS

Attachment 1 - Tabulation

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RESOURCE PERSONNEL

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Attachment 1

RFP 22-04 CRM EVALUATION RESULTS

QUALIFICATIONS SUMMARY

Vendor	Points (Max 60)	RFP Weight	Final Score	Shortlist
EAB Global, Inc.	40.36	30%	20.18	Yes
Servio Consulting, LLC	39.91	30%	19.95	Yes
TargetX	51.56	30%	25.78	Yes
Technolutions	45.84	30%	22.92	Yes
Crowe LLP	35.08	30%	17.54	No
Element451	35.05	30%	17.53	No
Alithya Zero2Ten	34.45	30%	17.22	No
Asesoftware Inc	21.31	30%	10.66	No

PRESENTATIONS SUMMARY

Vendor	Points (Max 80)	RFP Weight	Final Score
EAB Global, Inc.	37.11	40%	18.56
Servio Consulting, LLC	65.11	40%	32.56
TargetX	77.00	40%	38.50
Technolutions	50.89	40%	25.44

PRICING SUMMARY

Vendor	Points (Max 60)	RFP Weight	Final Score	Total Price 5 Years
EAB Global, Inc.	57.06	30%	28.53	\$ 657,243.00
Servio Consulting, LLC	36.53	30%	18.26	\$ 1,026,651.25 *
TargetX	24.12	30%	12.06	\$ 1,554,751.25 *
Technolutions	60.00	30%	30.00	\$ 625,000.00

*Price proposal includes estimated cost of software platform, Salesforce, procured separately.

Vendor	Final Score
Technolutions**	78.37
TargetX	76.34
Servio Consulting, LLC	70.77
EAB Global, Inc.	67.27

**Negotiated with highest ranked firm and determined the solution proposed would not meet all of the College's needs