Marketing and International Marketing CRM Scenario Based Demonstrations

**Version: 1.0**

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| Version Date | 11/7/2016 |
| Source |  |



**Introduction**

Please find below detailed scenarios that we would like you to demonstrate. Each step of the demonstration should be shown to the group using your software to indicate how you would accomplish the take at hand. Please don’t use PowerPoint or similar. Of course where you need to describe concepts and processes before your demonstration, you are welcome to use PowerPoint etc.

The detailed scenarios will be attended by staff from a variety of departments including Marketing, International Marketing and IT Services. Please be prepared to answer questions relating to your demonstrations and any other aspects of you CRM system.

**Proposed agenda**

9:00am Setup.

9:30am Overview and working demonstrations of how your system can satisfy the described scenarios.

12:30pm Lunch with stakeholders.

1:00pm Continuation of working demonstrations.

3:30pm Further questions from stakeholders.

5:00pm End.

Note. Refreshments and breaks will be provided throughout the day.

**Scenarios**

All shortlisted vendors will be asked to demonstrate the scenarios described below. If you are not able to fulfil a process, please identify how your system could provide limited functionality.

Delegates attending the demonstrations will mark each scenario in accordance with the points marking scheme described in the appendices at the back of this document. The average mark for all delegates for each scenario will then contribute to this phase of the tender process.

1. **Customer data system interface**

BSU has a key requirement to automatically enter data into the CRM from a number of different sources, primarily (for Applicants and Students) from the student record system SITS. Other customer records will be collected (mainly for Inquirers) via web site applications or on hand held devices at course inquiry events.

* Demonstrate your SITS-CRM interface working. Show the CRM without the records, run the upload process and demonstrate the CRM containing the new records. Provide evidence of how seamless and efficient this process is. Demonstrate how your system handles potential duplicate records and deals with error checking – an example being an Applicant’s name contains an invalid or unrecognised character.

**OR**, if you do not have a bespoke SITS-CRM interface….

* Demonstrate a configurable, working interface between an XML database and your CRM. Show the CRM without the records, run the upload process and demonstrate the CRM containing the new records. Provide evidence of how seamless and efficient this process is. Demonstrate how your system handles potential duplicate records and deals with error checking – an example being an Applicant’s name contains an invalid or unrecognised character.
* Demonstrate Inquirer records collected at a marketing event via an application on a hand held device (iPad or other). Demonstrate the process of uploading the newly collected records into the CRM. Provide evidence of how seamless and efficient this process is. Demonstrate how your system handles potential duplicate records and deals with error checking – an example being an Applicant’s name contains an invalid or unrecognised character.
* Demonstrate the upload of Inquirer data into the CRM via a BSU or non-BSU managed website. Provide evidence of how seamless and efficient this process is. Demonstrate how your system handles potential duplicate records and deals with error checking – an example being an Applicant’s name contains an invalid or unrecognised character.

Delegate notes

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Score out of 10 – For demonstration delegates only.

Please refer to the marking scheme in the appendices at the back of the document.

1. **Automated and scheduled email communication**

Once an Inquirer’s record is uploaded into the CRM, a series of standard and scheduled email correspondence is required. An example being - a series of 5 emails are required with a gap of 7 days between each. These emails should be scheduled into a task which once established requires no user intervention. You should…

* Demonstrate the setting up and flexibility of this scheduled task. Show the creation and scheduling of an email and demonstrate the specifying of the recipient list. Show how one email should follow another email and how the time gap between emails can be stipulated. Demonstrate how the email looks when received by the recipient and demonstrate that evidence of the email having been sent is recorded against the Inquirer’s record.
* Setup a scheduled email to contain dynamic content – for example a link to a website. Demonstrate how the email looks when received by the recipient and demonstrate that evidence of the email having been sent is recorded against the Inquirer’s record.
* Setup a scheduled email to contain dynamic content but specific to the course to which the Inquirer has expressed an interest. For example, the Inquirer record contains evidence that the Inquirer in question has expressed an interest in a pottery course. The CRM database has functionality to record a paragraph of information on each of the courses run by BSU. Identify the Inquirers course of interest, send them a scheduled email containing the paragraph of relevant course information. Demonstrate how the email looks when received by the recipient and demonstrate that evidence of the email having been sent is recorded against the Inquirer’s record.

Delegate notes

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1. **Bespoke email creation and allocation.**

As well as standard email scheduling, there is a requirement to write and send bespoke emails, distribute and record accordingly.

* Write a bespoke email containing dynamic content in terms of a web link. Show how the email can be dynamically linked to a number of different recipients depending upon a number of different characteristics. For example: -
  + All of the Applicants to a particular course.
  + All of the Applicants from China.
  + All of the Applicants who made an application to BSU between 2 dates.

Send the email and show evidence of the email being recorded against the Applicant’s record

* Select an email from a predefined library of emails. Dynamically select a number of recipients using a selection of different criteria. Send the emails and show evidence of the emails being recorded against each applicant.

Delegate notes

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1. **Other forms of Customer communication.**

There are various forms of customer communication which should be evidenced in terms of generation, individual/multiple customer association and recording against the customer record. Demonstrate your various means of communication. These should however include: -

* Generate a letter. Dynamically select a number of recipients and associate the letter with them. Demonstrate the fact that the letter has been associated with a recipient.
* Demonstrate that a telephone conversation has taken place with a customer. Show the attributes which can be recorded and any connected functionality.
* Demonstrate the functionality surrounding face to face communication.

Delegate notes

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1. **Social Media**

Expansion into more avenues of Social Media communication is something that BSU is very keen to further explore. Please demonstrate all of your functionality surrounding Social Media. This should include: -

* Select from a predefined library and the sending an SMS text message to a dynamically selected group of Applicants. Demonstrate the recording of the SMS text message against the Applicants record.
* Generate a bespoke SMS text message and send to a dynamically selected group of Applicants. Demonstrate the recording of the SMS text message against the Applicants record.
* Demonstrate the receiving of an SMS text message from an Applicant. How the CRM would deal with this and how the text message would be recorded against the Applicants record.
* Demonstrate functionality surrounding Facebook, Twitter etc.

Delegate notes

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1. **Evidence of Customer engagement.**

BSU needs to extend its knowledge and understanding of its customers to help establish improved marketing campaigns and gain a better understanding of which Inquirers are most likely to convert into Applicants and why.

Indicate by whatever means possible how customer knowledge and understanding can be improved as a result of CRM activity. This should include: -

* Information received as a result of Inquirers/Applicants engaging with links embedded within emails sent to them. What information can be gleaned by this interaction?
* Information gleaned as a result of Social Media interaction.

Delegate notes

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1. **Form creation and distribution.**

BSU will need to collect additional information from its Inquirers or Applicants. This may well be facilitated via an online form.

* Demonstrate the ability to design an online form to collect basic Applicant information such as emergency contact information.
* Associate and send to a dynamically selected group of Applicants.
* Demonstrate how the online form would appear to the Applicant, and populate the form for an Applicant.
* Record the fact that the form request has been made of the Applicant and demonstrate.
* Demonstrate the form data populated against the Applicant record.

Delegate notes

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1. **Event Management.**

BSU regularly runs marketing events to encourage the interest of potential Inquirers and to encourage as many Inquirers as possible to convert to Applicants. Present your Event Management functionality together with the specific requirements below: -

* Setup an Event. Give it a title, date, start time, end time, location and a description.
* Send invitations for the Event to a group of dynamically selected Inquirers.
* Enable Inquirers to register for the Event.
* Produce a register of names for the Event.
* Record the Inquirers who attended the event, update and display their Inquirer record.

Delegate notes

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1. **Link Schools to Applicants**

BSU’s main customers are Inquirers’, Applicants’ and Students’. There are however other customers of interest to the University. These include schools. A history of correspondence should be retained for these additional customers.

* Create a school as an additional type of customer.
* Describe how your CRM can differentiate between one type of customer and another.
* Display a list of all schools, select a school and send it an email.
* Associate a school with an Inquirer or an Applicant.
* Select an Inquirer. Via the Inquirer record, view all of the correspondence which has been sent to the school at which the Inquirer studied.

Delegate notes

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1. **Business Intelligence and Reports.**

Operational reports are vital to the running of both Marketing departments and Business Intelligence providing meaning from CRM data would contribute significantly to the strategic position of the University.

* Display/present any “canned” reports you would provide.
* Present how you would build a bespoke report to display all of the current Applicants on a particular course and of these Applicants, which were initially introduced to the University as Inquirers’.
* Demonstrate how you would schedule a task to automatically generate and email the above report to a member of staff every Monday morning.
* Demonstrate the extent of your CRM’s BI dashboarding functionality.
* Graphically present a dashboard of the number of Applicants currently applying for three of BSU’s courses. Graphically compare the figures for this year with the figures for last year. Drill into one of the courses to display the records of the Applicants in question.

Delegate notes

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Demonstration attendee signature:

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Overall mark (Out of 100):

Appendices

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| **Points** | **Interpretation** |
| **10** | **Outstanding –** Overall the response demonstrates that the bidder exceeds all areas of the requirement and potentially provides functional opportunities beyond those originally specified by BSU. |
| **9** | **Excellent** –Overall the demonstration meets all areas of the requirement and provides all of the areas evidence requested in the level of detail requested. |
| **7** | **Good** - Overall the demonstration indicates that the bidder meets all areas of the requirement and provides all of the areas of evidence requested, but contains some trivial omissions in relation to the level of detail requested in terms of either the response or the evidence. This, therefore, is a good response that meets all aspects of the requirement with only a trivial level of omission. |
| **5** | **Adequate** - Overall the demonstration indicates that the bidder meets all areas of the requirement, but not all of the areas of evidence requested have been provided. This, therefore, is an adequate response, but with some limited omission creating doubt as to whether the bidder can meet the requirement due to the bidder’s failure to provide all of the evidence requested. |
| **3** | **Poor** – The demonstration does not indicate that the bidder meets the requirement in one or more areas. This, therefore, is a poor response with significant failure to demonstrate whether the bidder can meet the requirement due to the failure by the bidder to show that it meets one or more areas of the requirement. |
| **0** | **Unacceptable** - The demonstration is non-compliant with the requirements of the scenario and/or no evidence has been provided. |

**Definition:**

An Inquirer is a person who via one means or another has expressed an interest in BSU or specifically a course run by BSU. An Inquirer may or may not convent to being an Applicant.

An Applicant is a person who has formally applied to BSU via UCAS or directly. An Applicant may or may not previously been an Inquirer.

A Student is an Applicant who has formally enrolled upon a BSU course.