Project Timeline

AUG

KICK-OFF, VISION, AND DISCOVERY

Over the course of our kick off and discovery period, we meet with project leadership to establish overall goals of the Enterprise CRM. We will also conduct interviews with the stakeholders across the university to gather document use cases, collect business and requirements and understand the types of features and functionality needed to support the teams and users.

SEP

REQUIREMENTS & ROADMAP REVIEW AND RFP DRAFTING

Once all requirements are gathered, we will spend several weeks distilling the findings into an organized list, reviewing business processes for improvements, and creating technology and staffing roadmaps. We will provide a report documenting our findings and recommendations for the RFP. Together these efforts will support the development of RFP content, and once finalized, we will work with the Committee to begin drafting the official document.

OCT-NOV

RFP RELEASE AND PROPOSAL DEADLINE

We will work with the Committee through the fall to finalize the RFP. We would aim to have the RFP finalized and posted by the beginning of November, with vendor questions due mid-month, and final RFPs due at the end of the month.

DEC-JAN

PROPOSAL EVALUATION

The month of December will be spent reviewing and scoring proposals, selecting vendors for demos, and scheduling demos for early January 2024. The holiday closure will need to be taken into account during these weeks of evaluation and scheduling.

JAN-FEB

DEMOS, VENDOR SELECTION, AND PROCUREMENT

All demos should be completed by the end of January, with a final selection made by the first week of February. The committee should allow several weeks to complete the legal contract and technical security review for implementation to begin in March 2024.