

**CRM Rewards Program
PLCB RFP #20170324**

Submitted Questions

Q1. On page 2 of this CRM RFP it states: “Solution should be deployed into a FedRAMP authorized cloud environment” Is FedRAMP mandated to be considered for this opportunity?

A1. *Offerors who propose or include non-“FedRAMP Authorized Products” should identify if their components are “FedRAMP In Process Products” or “FedRAMP Ready Products” as appropriate.*

Solution components without a FedRAMP status may be proposed, with further guidance provided on the security and the integrity of the Solution as FedRAMP Authorized Product status would otherwise indicate.

Q2. Is the PLCB amenable to granting an exception on FedRAMP compliance, to solution components that can demonstrate acceptable and sufficient security controls that meet the overall objective of FedRAMP security requirements?

A2. *See A1.*

Q3. Please elaborate on the FedRAMP requirement. What aspects of FedRAMP are absolutely required? Is this specific to certain kind of data? Could parts of the system be FedRAMP certified while other parts are not? Please explain.

A3. *See A1.*

Q4. Can you provide current number of stores?

A4. *Currently, there are 607 brick-and-mortar Fine Wine & Good Spirits (FW&GS) stores across Pennsylvania, plus one e-commerce fulfillment center.*

Q5. How many stores will be involved in the pilot market?

A5. *23 FW&GS stores will be involved in the pilot.*

Q6. Will the pilot program in a small market be the free discount program (only) or will it include paid or points-based elements?

A6. *The pilot program will only offer the free program.*

Q7. During the first year of the launch, how does PLCB plan on offering a program limited to certain physical locations, knowing that online and mobile apps do not have the same geographical boundaries, meaning – will non-participating locations have an exception process to allow sales under the discount program as an “override” which must be tracked during the pilot?

A7. *During the pilot period, non-participating locations will not have an exception process, and program benefits will not be available at non-participating locations.*

Q8. How many stores will be involved in the full rollout?

A8. *All FW&GS stores, which includes the 23 pilot stores.*

Q9. Can you provide number of POS lanes/devices per store?

A9. *Currently, there are 1,450 total POS devices across 607 stores. The number of devices in each store varies based on the size of the store but ranges from one to seven devices per store.*

Q10. Re: I-4. B.2.b., How are customer inquiries captured in POS?

A10. *Customer inquiries are not currently collected in POS.*

Q11. Are store operators intended to access the system other than through the POS interface? If so, please indicate their expected role.

A11. *Yes, store managers are intended to access the system to monitor store performance. Retail Wine Specialists and/or other store staff are also intended to perform clientelling. It is intended that Store Managers and Retail Wine Specialists will be able to access the system (with the correct authentication) through any device with an internet connection and web browser.*

Q12. Is there a dedicated desktop or device for store managers in addition to POS devices?

A12. *Yes, there are dedicated desktops.*

Q13. What is the annual transaction volume from stores and from eCommerce?

A13. *There are approximately 68 million transactions per year in the FW&GS stores. There were 20,536 orders placed on the FW&GS website during the 2016/2017 fiscal year.*

Q14. What is the estimated volume for customers participating in the PLCB CRM system?

A14. *PLCB estimates the total population of existing customers to be approximately 7.3 million, though this number is not necessarily the number who will participate in the program.*

Q15. What is the total number of customers?

A15. *See A14.*

Q16. How many constituents are expected to participate in the program?

A16. *The total estimated participants per year are as follows:*
Year 1 – 89,999
Year 2 – 2,586,434
Year 3 – 3,008,954
Year 4 – 3,546,872
Year 5 – 3,776,746

Q17. What is the year-to-year customer increase rate?

A17. *PLCB does not currently track total number of unique store customers.*

Q18. “Day 1” of the Pilot and “Day 1” of the full launch, will customers start with zero history, or will past purchases be considered, either systematically or manually?

A18. *All customers will begin with no history at the time of sign up. Customers who sign up during the Pilot will carry over earned benefits during the full launch.*

Q19. What is the total number of transaction per week, month or year?

A19. See A13.

Q20. How many visitors do you have in a month or week?

A20. *Visitors at store locations are not tracked. During the 2016-2017 fiscal year, 2.4 million users visited the FW&GS website.*

Q21. How many unique subscribers do you currently have to use towards a loyalty program? What is the expected number after the first year of this RFP?

A21. *Currently, see A14. Expected, See A16.*

Q22. What is the percentage of transactions that would have a promotional discount that would be generated from CRM system

A22. *Information is not currently available.*

Q23. What percentage of transactions are Returns, where the various systems being integrated need to ensure the prior purchase is audited and authorized for (a) the return itself, (b) the decrement of points previously given [for the points-based program being contemplated].

A23. *Currently, 0.2% of transactions are returns.*

Q24. Has PLCB considered how Return/Exchange transactions (for example, one which is used by store personnel to correct a pricing error) will be reflected in the system in terms of re-evaluating prior discounts or eligibility, etc.?

A24. *PLCB has existing fraud and audit processes that are expected to be enhanced by the proposed Solution. Offerors are expected to propose industry best practices to enhance current efforts.*

Q25. What are the commercial transaction counts. A transaction is a sale or return captured at POS, not transactions such as employee clock in/out, drawer opening or inventory movement.

A25. See A13.

Q26. How many logins would you forecast within the site by customers in a given week or month? Please provide rough numbers at the very least.

A26. Currently, there are 38,000 active profiles on the FW&GS website. See A16 for total estimated program participants.

Q27. Will Customers be able to login to the system to view and customize their profile/points?

A27. Yes, it is expected that the proposed Solution will contain this functionality.

Q28. If a user with an account does not log in but does proceed to browse the site for purchase, does PLCB expect to provide personalized and relevant experiences based on prior site usage? Is this expected to be common scenario?

A28. Yes, this functionality is desirable. It is unknown if this will be a common scenario.

Q29. How many logins would you forecast for full time PLCB and part time PLCB employee at remote locations?

A29. See RFP Appendix R for expected counts of named users and consider that only 100 of the 3600 total Store Staff are expected to need a log-in.

Q30. Would you be able to share your systems diagram that might show how they are connected/integrated?

A30. See Attachment #1 to this Questions document.

Q31. Does the PLCB have an existing middleware architecture that can be used to broker communications between different systems? If so, please define.

A31. PLCB will consider alternative components for the middleware. Oracle Retail Information Bus is currently in use.

Q32. Do you have a middleware tool for integration?

A32. See A31.

Q33. If you do not have a middleware, do you have a preference on a specific middle or would you like the vendor to recommend one?

A33. See A31.

Q34. Is your mobile app developed on iOS and Android platform?

A34. Yes.

Q35. Page 20 letter d. With Apple and Android representing 99.6% of all mobile phones in the US, is Microsoft UWP a requirement? Would a mobile responsive web platform suffice for those not on Android or Apple?

A35. *No, Microsoft Universal Windows Platform is not a requirement. Yes, a mobile responsive web platform will suffice for non- Android and Apple devices.*

Q36. Is PLCB currently using a cloud-based platform/solution?

A36. *Yes, but currently not with any Retail CRM cloud deployments.*

Q37. Can we see a diagram how your POS, Mobile app and other systems are integrated?

A37. *Systems are not fully integrated at this time; however, see Attachment #1 PLCB Architecture.*

Q38. Please provide an architectural diagram including technical details for the existing PLCB environments and systems with which the Offeror will be integrating.

A38. *See Attachment #1 PLCB Architecture.*

Q39. What roles do third-party vendors play in marketing which would require system integration?

A39. *It is expected that the Solution will be integrated with all third-party marketing vendors, both current and proposed. Currently, such roles include email marketing and media buying, including social ads. In the future, the proposed Solution should include the ability for SMS bi-directional text messaging and push notifications.*

Q40. Does PLCB require any integration to third party systems beyond the scope of Appendix O? If so, please list them.

A40. *Yes, see A39. Social media connectivity will be required.*

Q41. Re: I-4.B.: *“The Solution will be integrated into the agency’s back-end systems, such as... merchandising, point of service (POS), and enterprise data warehouse (see Appendix O for further details). It will also need to integrate with third-party vendor systems to ensure the Project reaches its full potential.”*

Are there ‘third party vendors’ other than those listed in Appendix O? If so, please list and describe the functions PLCB envisions them performing.

A41. *Yes, see A39.*

Q42. Does PLCB anticipate any significant updates or changes to the IT Systems and/or Software detailed in Appendices O and P? If so, please provide detail.

A42. *Yes, please presume that each component will evolve over time.*

Q43. Can PLCB provide any architecture diagrams that help visualize the existing integration / usage / data flow / boundaries of the systems outlined in Appendix P?

A43. *See A30.*

Q44. Besides maintaining master customer data, what role and data does PLCB anticipate for the CRM system itself?

A44. *See RFP Part I, Section I-4. B.*

Q45. Is there existing database or data warehouse where customer information must be stored back to? What technology and version numbers is used? What data must be stored back?

A45. *The existing database is Azure SQL Data Warehouse, which is a cloud PaaS offering.
Unique source system information captured and maintained in the CRM environment is to be populated and stored into PLCB's data warehouse.*

Also, see RFP Appendix P.

Q46. What are the details of the legacy data that needs to be migrated into the system?

A46. *Existing ecommerce purchase data, existing POS transactions (including licensee customer identification), and a SharePoint list of customer contacts from PLCB Consumer Relations will need to be migrated into the system.*

Q47. How many active contacts in the database?

A47. *Currently, there are 38,076 active customer profiles in the database.*

Q48. There are a number of integration points mentioned throughout the RFP. Can the contractor assume that no underlying technology changes will occur during project start and end?

A48. *No.*

Q49. What is the breakdown of internal PLCB (IT) staff, PLBC staff, senior management users?

A49. *See RFP Appendix R for projected number of internal PLCB users.*

Q50. How many internal users will need access to the system? Can you approximate the number of users in the following categories:

- a. Administrators**
- b. Marketing users (create campaigns, segmentations, emails)**
- c. Reporting users**

A50. *See RFP Appendix R. Additionally, the following are estimates: 11 administrators, 25 marketing users and 1,114 reporting users.*

Q51. What roles within or outside of PLCB will be hands-on with the selected solution? Are they centralized or de-centralized? Internal and external users? What is the average level of technical proficiency? Is there an anticipated workflow?

A51. *See A50 for roles within PLCB and see A39 for roles outside of PLCB.*

PLCB roles are centralized at PLCB's Harrisburg HQ location and decentralized at PLCB stores across the Commonwealth.

For internal user counts see Appendix R, and see A39 and A40 for external users.

Please presume that the selected Offeror will be implementing all integration and configuration tasks, therefore the technical proficiency of the Offeror's staff should be described in the submittal.

Anticipated workflow: See Part III-4 Tasks and Deliverables.

Q52. Does the Commonwealth current have a Portal for users for remote access?

A52. *Yes, VPN access is available for certain users.*

Q53. What is LCB's roadmap/life cycle information with the existing front end/Commerce and mobile app environments? Please include any planned upgrades, functional enhancements planned, etc.

A53. *Technical roadmap and life cycle are not being published. For reward program customer experience, see Attachment #2 to this Questions document. Other roadmaps/life cycles are not available.*

Q54. Are there any campaign management or marketing/marketing automatization tools or process in place already that are relevant for this RFP?

A54. *No.*

Q55. Appendix P: Existing software products - is there life cycle information for these products available: to maintain / replace them over a period of time?

A55. *Relevant information to be shared with selected Offeror.*

Q56. Integrating the Solution into PLCB systems requires knowledge of the customizations that may be in place. Does PLCB have documentation for POS system, e-Commerce system, native mobile apps, and data analytics system? If so, can those documents be shared?

A56. *Information will be reviewed with selected Offeror during detailed project planning.*

Q57. Is it expected that the proposed Data Analytics and Reporting capabilities must capture the underlying data models contained within the systems referenced in Appendix O so that PLCB is capable of performing Analytics across the entire enterprise?

A57. *PLCB is not looking for the Solution to be PLCB's primary analytics and reporting tool. The proposed Solution should include analytics and reporting for its own data.*

Q58. How does the Data Analytics and Reporting for this solution align with your overall Enterprise Data Lake and Analytics strategy?

A58. *Proposed Solution data is to be copied into PLCB's Data Warehouse.*

Q59. Page 20 2E.2 What is the "PLCB data analytics environment". What technologies are in place for storing and analyzing data?

A59. *See RFP Appendix O; PLCB currently uses Cortana Analytic Suite for storing and analyzing data.*

**Q60. 2E.2:
Data Analytics Environment – any architectural constraints?
Are there any performance metrics, sizing metrics, volumes available?
Data Quality is out of scope?**

A60. *See A59 for the Data Analytics Environment.*

PLCB data warehouse is not currently limited by performance metrics, sizing metrics or volumes.

Proposed Solution should include data quality management capabilities for CRM program data.

Q61. 2E.8:

What are the Key Performance Indicators that will be used?

Please provide details (i.e., Sizes, Rows, Versions, Data Dictionaries) about the different data sets within your organization that drive KPI and dashboards/reports. Also, how many dashboards and reports are required and can you send a sample of your most complex dashboard?

A61. *See RFP Part III – 4, Task 2. More specific KPIs, dashboard and reporting requirements will be identified with selected Offeror during the development of the project. Offerors are expected to demonstrate the capability of their proposed Solution.*

Q62. What key performance indicators will be used to evaluate marketing performance?

A62. *See A61.*

Q63. How much legacy eCommerce data can be loaded into the analytics engine?

A63. *All existing PLCB data can be loaded in the current PLCB data warehouse. Legacy ecommerce data is less than one terabyte.*

Q64. 2E.10:

What are the use cases for performing Predictive Analytics? *Predictive scenarios should include customer churn analytics and product placement guidance.*

Do we need to create a general Predictive Analytics scenario or are we targeting any specific business area? – *An example would be consumer reaction to various marketing campaigns.*

Please provide Database & Operating System Details for Predictive Analytics:

- a. Database Server Detail: Version, Edition, Service Pack**
- b. Operating System: Version, Edition, Service Pack**
- c. List of Databases: Name, Number of Tables, Size (in MB)**

For a, b, and c: Regarding database and operating system details, PLCB utilizes the cloud PaaS and SaaS Cortana Analytic Suite.

How many years of data is available? – *Depending on the data source, up to seven years of history data may be available.*

Will there be any type of migration or data? - *Limited sales data will need to be migrated with this project.*

A64. *See responses within above.*

Q65. What are the challenges driving the need for a loyalty program?

A65. *See RFP Part I, Section I-4 Objectives.*

Q66. More details about your program design would be helpful to get more granular in our pricing exercise. Do you have more specifics ready to describe your discount-based loyalty solution for launch?

A66. *The anticipated program design is based on sales discounts across multiple product and price segments. PLCB is also interested in offering unique sales offers and promotions such as sweepstakes or free shipping, as well as digital coupons (IRCs).*

Q67. What are the key objectives of the program? For example:

- a. Increase in same-customer sales (value-tier migration)?**
- b. Stem attrition among border residents who purchase in other states?**
- c. Increase purchase of additional products (new-to-customer products)?**

A67. *See RFP Part I, Section 1-4 Objectives.*

Q68. Please clarify the delivery channels for loyalty offers and/or rewards redemption. Will real time integration between the loyalty system and IBMS/POS be required to support redemptions?

A68. *Delivery channels include email, mobile, in-store and through PLCB's online ecommerce store. Near real time integration is desirable.*

Q69. Will the loyalty system be expected to surface discount offers from product manufacturers? If so, will there be rules/constraints regarding who is eligible/targeted? Will there be rules regarding number of offers?

A69. *Yes, to all of the above questions.*

Q70. Page 2, 2.b. States that "the solution must have the ability to track sales made through each of these systems, as well as capture customer inquiries and incomplete sales from the online and mobile systems".

Can we assume that tracking of sales through these systems is limited to tracking of sales associated with the loyalty program (vs. all sales)?

A70. *It is expected that the proposed Solution will only track sales associated with the CRM program.*

Q71. **Is optimization of the offers to loyalty members to drive the best revenue/profits in scope?**

A71. *Yes.*

Q72. **Does PLCB integrate with other delivery apps like Minibar, Drizly etc? Or is the delivery service strictly executed by PLCB?**

A72. *PLCB does not currently integrate with other delivery apps, although a Request for Information concerning Same Day Delivery Services was issued on August 31, 2017. See Commonwealth of Pennsylvania's eMarketplace site: <http://www.emarketplace.state.pa.us/Solicitations.aspx?SID=20170831> Currently, deliveries of product ordered via PLCB's eCommerce website are executed by UPS pursuant to statewide contract.*

Q73. **In addition to the technology integration, should we be proposing the experience design (UI/UX) components of the loyalty program? This could include interface design for a portal, mobile application, point of sale, etc. If not, will the experience design be done by a team in house or another 3rd party, and if so, in what nature would the chosen vendor work with them?**

A73. *Experience design will be performed by PLCB with PLCB's third-party marketing vendors. Selected Offeror will be expected to work collaboratively with PLCB and its third-party marketing vendors.*

Q74. **Are there any exceptions to items that customer value scores, points, or plateau-based discount awards can be earned by purchasing?**

A74. *Rules will be developed with the selected Offeror.*

Q75. **For returnable products (if any), how much lag is required for the expiration of returns before points (or other 'currency') is made available for redemption?**

A75. *Rules will be developed with the selected Offeror.*

Q76. Does PLCB currently have/maintain customer profiles? If yes, what attributes are included in the profiles? Have dependent variables been identified in segmentation?

A76. PLCB has an email list that segments consumers by wine or spirits, or both, as preferences.

Q77. Is PLCB governed by an existing privacy policy that could impact the collection use of personally identifiable data (PII)?

A77. Yes. See the privacy policy at FineWineAndGoodSpirits.com. Additionally, the Pennsylvania Liquor Code prohibits PLCB from selling or otherwise making available to the public the names, addresses, or any records or information that would disclose the personal purchase choices of individual consumers. See 47 P.S. §2-207(m)(2).

Q78. Will the proposed loyalty program be restricted to residents of Pennsylvania, the United States, or a broader geography? If broader, please define the potential scope.

A78. No, the program will not be restricted to residents of Pennsylvania.

Q79. Does PLCB anticipate running multiple loyalty formats (e.g., paid, hidden discount, points) simultaneously? Would movement in/out (between) one format to another be allowed, or would there be a 'switch-over' point?

A79. The proposed Solution is expected to have the capability to run multiple formats.

Q80. Since the Loyalty program is not initially intended to be "customer-facing", how does PLCB envision the rewards/awards discounts to be applied / distributed, and by whom? eCommerce storefront? POS? Call Center? Price Overrides? System-generated? Email?

A80. The discounts will be applied and distributed through the campaign management system through the e-commerce storefront, POS, email and mobile.

Q81. Does PLCB have an existing database to market the points solution to upon rollout? If so, what is the size of this database?

A81. *PLCB has a limited consumer email database that contains approximately 75,000 identities.*

Q82. **Would PLCB be interested in alternatives to Commerce and mobile app areas given pre-developed end to end integration with all underlying marketing and loyalty functionality?**

1. **If not in scope at this time, would LCB be willing to consider as an option?**

A82. *Yes, PLCB will consider alternatives to Commerce and mobile apps. Each Offeror should propose the components they determine to be relevant to their Solution.*

Q83. **How customizable are the POS system, ECom and Mobile applications? Will the Offeror have direct access to these systems for integration, or should the Offeror work with appropriate 3rd parties?**

A83. *The native mobile applications are internally developed, and the source code will be available. POS and e-commerce are third-party applications from Oracle and IBM, respectively.*

Q84. **Re: I-3, Please list the channels that you plan to use for customer communications. Are there additional channels that you anticipate adding in the future?**

A84. *PLCB anticipates using email, in-store, and e-commerce. Additional channels will be SMS text messaging and push notifications.*

Q85. **What is the current volume of email communications? What other marketing/communication channels are required for the solution set to use? Email? SMS text? Other ?**

A85. *Current volume of email communications is approximately 74,000/month. For other channels, See A84.*

Q86. **Does PLCB currently have relationships with Email or Mobile Messaging suppliers? If so, please identify. If not, would PLCB consider recommendations for integrated solutions?**

A86. *Currently Listrak is PLCB's mass email provider pursuant to statewide contract. PLCB does not currently have a mobile messaging solution. PLCB would consider an integrated solution.*

Q87. In section 2D about the campaign management tool, are you also looking for the Offeror to deploy the messages to the members? Or will we work through your pre-established third party?

A87. *PLCB has an established third-party provider for email. See also, A86.*

Q88. Also from section 2D, are you interested in communications by all channels - email, SMS, push notification, etc.?

A88. *Yes, see A84.*

Q89. Will you provide examples of the different kinds of communications you have for promotional messaging? For transactional messaging?

A89. *You can review PLCB's current social media posts and sign up for email communication at FineWineAndGoodSpirits.com*

Q90. Are push notifications through an external mobile app in scope of the RFP?

A90. *Yes.*

Q91. Are text messages in scope as part of the Marketing campaign communications?

A91. *Yes.*

Q92. Is Social advertising in scope of the RFP?

A92. *Yes.*

Q93. Re: I-4.B.: What social media properties/apps are in scope for monitoring, publishing and response?

A93. *PLCB currently utilizes Facebook, Instagram, Twitter, YouTube, and Pinterest. Additional social media channels will be considered.*

Q94. 3.a.i: "A campaign management Solution to create, plan, set up, execute, and track complex promotions provided through a variety of touchpoints such as in store, mobile, email, and social media." What social media platforms does the PLCB currently leverage or plan to use for the campaign management solution?

A94. *See A93.*

Q95. Social Media listening and response is listed in the General Requirement but not detailed in the Task/Deliverables, can you provide more detail on desired functionality and specific social channels?

A95. *See A93. Also, see RFP Part III, Section III-4 Task 2A.10.*

Q96. Is single sign-on required from any of the PLCB applications to the SaaS based solution?

A96. *Yes, a single sign on is desired for retail customers to interact with FW&GS branding. Internal PLCB staff will authenticate using Commonwealth Active Directory and Azure Active Directory.*

Q97. Re: I-4. B.2.f., Does Unique ID mean Identification (DL/State ID) for fraud detection?

A97. *PLCB needs a unique identifier for each consumer. The driver's license is proposed due to the nature of the business. The only information that will be retained from the driver's license is name, address and date of birth.*

Q98. Re: I-4. B.3.a.iv., Would PLCB like the Offeror to build models, then train staff on how to build more/refresh models? Please clarify.

A98. *Yes, the selected Offeror is expected to build sales promotion models and train PLCB staff on same.*

Q99. Re: I-4. B.4., Is the long-term plan to have PLCB staff fully trained and self-sufficient on running this system, or should the Offeror plan to provide a support team for ongoing operations after the system is fully implemented?

A99. *Yes, the long-term plan is to have PLCB staff fully trained and self-sufficient to run this system. However, see also Operational Support requirements set forth at Part III-4 Task 3 on pages 21-22 of the RFP.*

Q100. **What are the key metrics you will use in determining success of the implemented solution set? If you have them, please share the baseline metrics that you already have.**

A100. *Metrics will be shared with the selected Offeror.*

Q101. **When do you need to have something in place? What is driving that date?**

A101. *See Part I, Section I-4. Furthermore, PLCB is striving to introduce the pilot in the first quarter of 2019, with statewide rollout targeting the second quarter of 2019. Specific project timelines will be negotiated with selected Offeror.*

Q102. **What are the toughest use cases you'd like us to show (or hope) we can solve?**

A102. *See RFP Part I, Sections I-1 through I-4.*

Q103. **In terms of format of the Technical Submittal, we understand that we should follow the format exactly, III-1 (Statement of the Project), III-2 (Management Summary), but when we get further into the document, should we just describe how we will perform each of the tasks and deliverables identified in the subsections (1.1, 2A.1, etc.)?**

A103. *Yes, describe how you will perform the tasks and deliverables using the format as laid out in each task.*

Q104. **In section III-4, you mention your Project Online system. We use JIRA & Confluence for tracking of tickets, issues, resolutions with our clients. Would your team also consider using our tracking system in working with us if we also update your system with the resulting documentation (project plan, risk reports, status reports)?**

A104. *Yes, PLCB is open to considering other tracking systems.*

Q105. Is the intended loyalty/rewards strategy already defined? If 'yes,' can you share details regarding the customer experience design for each channel (store, .com, app, other)? If 'no', is that to be a component of the RFP response?

A105. PLCB has a high-level loyalty/rewards strategy. Details will evolve with the development of the program with the selected Offeror. Also, see RFP Part I, Sections I-3 and I-4, and Attachment #2 PLCB Customer Journey.

Q106. Will you need any additional strategic help on the initial program strategy? Should we include this in our costing?

A106. See A105.

Q107. Is this project part of a larger strategic roadmap/digital for PLCB? If so, can you share some more details?

A107. See A105.

Q108. Has a budget been defined for this Project effort? If so, what is that budget?
a. Annual License Cost
b. Implementation

A108. The project is included in PLCB's budget planning. PLCB will evaluate proposals based on RFP Part II, Section II-4.

Q109. Please provide the budget for this project.

A109. See A108.

Q110. Did PLCB evaluate solutions that could meet its requirements through vendor demonstrations leading up to the RFP release? If so, what types and names of solutions and vendors were evaluated?

A110. PLCB did not evaluate any vendor demonstrations.

Q111. Did PLCB use a vendor to help develop the RFP? If so, can you please share the name of the vendor?

A111. *Deloitte Consulting was contracted for research on CRM-Loyalty programs, but no vendor directly assisted with RFP development.*

Q112. Did the PLCB contract with a vendor for RFP development and/or consultation? If so, please disclose the vendor?

A112. *See A111.*

Q113. What is the implementation timeline? When does this system need to be live?

A113. *See A101.*

Q114. Is there a project timeline for this project?

A114. *See A101.*

Q115. Is there a timeframe in which PA LCB looking to begin the initial pilot? Optimally, when would be the best time for LCB to commence work?

A115. *See A101.*

Q116. Are there any seasonal/business event considerations (i.e. traditional slow periods, etc.) which would align with phased deployments and training?

A116. *See RFP Part III, Section III-3. B on page 15 of the RFP.*

Q117. If technically feasible, is PLCB willing to divide the scope of the effort contained within the RFP into phases for a more effective implementation effort?

A117. *See RFP Part III, Task 1. PLCB will engage in specific project planning with the selected Offeror during implementation phase.*

Q118. Given segmentation tracking in conjunction with a CMS and targeting capability can drive a loyalty and conversion effort without a CRM in place, would PLCB consider deploying a CRM in a later phase to meet project timelines?

A118. *Specific project planning to accomplish all of the tasks identified in the RFP will be considered with the selected Offeror. PLCB expects the selected Offeror to provide a combination of components which will satisfy all aspects of the RFP.*

Q119. During the configuration and implementation phase, is the professional services team allowed to use Agile software development as a methodology?

A119. Yes.

Q120. When does the PLCB anticipate a “sign by” date for the contract?

A120. *The contract is currently anticipated to be signed during the second quarter of calendar year 2018, assuming no major contract issues present themselves.*

Q121. When does LCB intend to contract?

A121. See A120.

Q122. Page 3, 2.c. States that this “must be integrated with PLCB third-party vendors tasked with specific marketing roles”. Is this a request for a technical integration (if so please specify), or is this a request for agency user access? Please approximate the number of 3rd party vendors who will need to be considered for training and categorize their major roles.

A122. *Where possible, the Solution should provide technical integration capabilities with third-party vendors, otherwise, user access will need to be used. Also, see A39.*

Q123. Page 18 2A.10 What other “select third-party vendors” are currently or will be engaged to support personalized creative across channels? What channels are you referring to?

A123. See A39.

Q124. For training and knowledge transfer, is the customer amenable to "train the trainer" workshops and standard, informal technical knowledge transfers to local IT teams?

A124. See RFP Part III, Section III-4, Task 4.

Q125. Please describe in further detail the expected method of training and the resources that will be provided by the PLCB related to training the store managers and operators.

A125. See A124.

Q126. Will PLCB provide a list of the departments that will be directly impacted by the implementation?

A126. Departments impacted during different phases of the project will be clarified during specific project planning with selected Offeror.

Q127. What software does your contact center currently use to track category and resolution details?

A127. Genesys Contact Center.

Q128. Page 19 2B.3 Does PLCB have an existing call center and case management or support system, for example in support of its current e-commerce or call center? - Yes.

If so:

- i. What is this system? – See A127.**
- ii. How many users are there (there is no mention in Appendix R) and what are their roles? – Approximately 20 named users, or 10 concurrent users.**
- iii. How many case types/categories are being tracked? – The primary centralized call center is currently configured using a 3-tier Category, Type, Item hierarchy. This configuration may evolve over time. The top level category has five options which govern the values and quantities of the available Types, then in Items. Each additional level (Type and Item) generally has 1-10 options to select from.**
- iv. What is the current case volume? – Approximately 1,200/month**
- v. Is there a call center? – Yes.**
- vi. How many agents? – 20 agents.**

If Not

How many projected agents?

- vii. What channels does PLCB wish to provide support through (email, social, web, live chat, phone) - All**

A128. See responses within above.

Q129. Page 19 2C.5 What eCommerce provider are you using today and what version of its software have you deployed?

A129. IBM Websphere Commerce Pro 7. See also Appendix P PLCB Software Versions.

Q130. Page 19 2C.2 Can you provide a definition of what “specialty retail relevant” fields are specific to your industry?

A130. PLCB-specific and specialty retail relevant fields will be developed with the selected Offeror. PLCB request that Offeror provide recommendations on such functionality as part of the technical submittal.

Q131. Is there in-store technology in place today to support signup? Do existing pin pads or POS interfaces allow for capturing of customer data (name, email, phone)?

A131. The current POS environment, including pin pads, support sign-up functionality; however, that functionality will need to be configured by the selected Offeror.

Q132. What is the Point of Sale technology, including version numbers. Do all retail locations use the same technology and versions?

A132. All retail locations use the same POS technology. See Appendix P to the RFP for further details.

Q133. What manufacturer and model of scanners at POS are currently used today? Do they support scanning images delivered to mobile device?

A133. Symbol DS9808 (Motorola). The scanners can scan a barcode from any surface, including mobile devices. Special functionality / software is neither available nor required to support scanning images delivered to mobile devices. However, several external factors can contribute to the success rate: image size and resolution, screen protectors (may reflect or block scanner lights), cleanliness of the device surface, display settings on individual devices, etc.

Q134. What make and model register printer do you currently support today? Are they serial based or connected to the cloud

A134. IBM (Toshiba) 4610-2CR. Serial based.

Q135. Are pin pads for loyalty lookup in place in stores today? If so, what technology and versions are deployed?

A135. *Yes, pin pads for loyalty lookup are in stores today. Verifone MX925. Pin Pads are deployed primarily for electronic payment purposes today.*

Q136. Are there existing mobile apps? If so, can you provide mobile app details... launches, events, time spent, etc.

A136. *Yes, there are existing native mobile apps that were developed internally for both Android and iOS. Further details to be shared with selected Offeror.*

Q137. Can the existing mobile apps support integrating the loyalty vendor's software development kit?

A137. *See A136.*

Q138. What mobile apps are currently live and what framework are they built on? Are they currently integrated with the existing POS and eCommerce providers today?

A138. *The current mobile application is built for iOS and Android and is integrated with existing POS and eCommerce providers.*

Q139. Who is your current mobile app vendor?

A139. *Apps were custom-developed by PLCB.*

Q140. What, if any, are the demonstration scenarios that PLCB would like to see presented? What is the proposed timeframe for these software solution demonstrations?

A140. *See RFP Part I, Section I-17. Demonstrations may be requested by PLCB as part of a Best and Final Offer process. Specific requirements and timelines will be provided to eligible Offerors in accordance with the noted provisions of the RFP.*

Q141. Which functions/portions of the proposed solutions is PLCB looking to access via MobileWeb / Native App interfaces?

A141. PLCB seeks Offeror recommendations on such functionality.

Q142. Does PLCB support both physical & virtual gift cards/certificates? Would PLCB consider utilizing gift card functionality within the proposed solution, or looking to continue utilizing ACI?

A142. PLCB does not currently have virtual gift cards. The proposed Solution should be able to work with both physical and virtual gift cards.

Q143. Appendix O: Disaster Recovery (DR) in Dynamics 365 Online is included per the Product Line Architecture (PLA). Does PLCB expect the contractor to perform additional DR activities for Oracle DataGuard and AIX/Linux?

A143. Connectivity to the Offeror's Solution from PLCB DR resources are to be configured by the selected Offeror.

Q144. Appendix O: For Disaster Recovery, does the PLCB expect the contractor to include current PLCB technologies and infrastructure in the overall DR plan?

A144. Yes, existing infrastructure and technology should be considered.

Q145. What identity provider(s) is the PLCB using to authenticate internal and external users?

A145. PLCB currently utilizes the Commonwealth Active Directory and Azure Active Directory for authentication of internal users.

Q146. The RFP mentions 3rd Party vendors and access for those users. Can the PLCB detail how they grant 3rd party access to tools and marketing modules today?

A146. Information will be made available to the selected Offeror.

Q147. 2E.1:

Is PLCB looking for a lambda architecture solution? – The selected Offeror will integrate with PLCB Data warehouse.

Does PLCB have business rules defined for segmentation, triggers and behavior tags? – *Business rules will be reviewed with the selected Offeror.*

Does PLCB have loyalty club levels and rewards defined? – *Rules and definitions will be defined with the selected Offeror.*

If so,

How many club members? How many transactions per customer/club member?

How many marketing campaigns?

How many segments per communication?

A147. *See responses within above.*

Q148. 2E.6:

Can the PLCB provide a diagram of the security constraints and any role-based access, and also how it's administered in the organization today?

A148. *Security and access details will be shared with the selected Offeror.*

Q149. III-11 and Appendix A:

Would PLCB consider contracting under an existing Master Services Agreement negotiated between Offeror and the Commonwealth of Pennsylvania, and used by PLCB in the past, in lieu of the IT Contract Terms and Conditions in Appendix A?

A149. *No.*

Q150. Appendix A, 48:

Although the RFP states that the Warranty Period and Developed Works is defined in Part III-2(F), a search of the RFP did not identify that section. Please identify the warranty period and developed works requested pursuant to this RFP.

A150. *See page 15 of the RFP.*

Q151. For both B2B and B2C, can they provide the following for the past year:

Number of server calls per month – *Current platforms do not identify or capture this data.*

Number of page views per month – *Current platforms do not identify or capture this data.*

Number of active customer profiles – *38,076*

A151. *See responses within above.*

Q152. Does the current mix of systems track an integrated view of sales made in-store, online, and mobile application, including incomplete sales?

A152. - Current systems provide minimal tracking of such sales.

Q153. Will the PLCB consider Time and Materials professional services responses?

A153. No.

Q154. Does PLCB have wireframes which can be shared with potential respondents showing the desired POS, online, and mobile app Registration process, and online/mobile app self-service Profile Management processes?

A154. Such resources will be shared with the selected Offeror.

Q155. Must users create an account and establish a unique identifier to complete a purchase? Or is that a possible deterrent to conversion?

A155. No, users do not need to establish an account to complete a purchase.

Q156. How important is the ability to personalize and optimize the on-line experience for anonymous users?

A156. Personalization is required for authenticated users, but not for "anonymous" or "guest" users. Also, see A28.

Q157. Can "anonymous" purchases be completed as well (i.e., a guest check-out such as with Nike.com), where a user ID and password is not required?

A157. Yes, see A155.

Q158. Is there a perceived challenge in converting visitors from anonymous to those that create accounts, or is it assumed this will not be an issue?

A158. This information is not germane to Offerors' proposals.

Q159. Has PLCB already identified and utilized persona and on-line segmentation? Please identify any persona or segments that would drive customer experience and be considered in tandem with loyalty status.

A159. PLCB is in the early stages of customer segmentation and identification of personas. More detail will be shared with the selected Offeror. Persona and segments will be implemented with selected Offeror.

Q160. Can it be assumed that all digital assets required to produce visitor experiences will be available in a digital asset management system?

A160. Yes.

Q161. Can it be assumed that all capabilities discussed in the RFP with regards to marketing automation, campaign management, loyalty programs, and personalization will NOT in some fashion be provided through the selected campaign management system?

A161. Offerors' proposed Solution should include all components necessary to satisfy all capabilities discussed in the RFP.

Q162. How many domains do you have? Do you want to track each domain separately and roll it up to a global suite; or just have it all in one suite?

A162. PLCB currently has approximately 25 domains. Each is to be tracked separately, rolling up to a global suite.

Q163. Do you now or plan to run video on any of your sites? Do you want to track the video streams? Number of video stream per month? Video Length?

A163. Yes, PLCB currently runs video and wants the ability to track video streams. Video streams per month and length of videos are TBD.

Q164. 2.c: "The Solution must be integrated with PLCB third-party vendors tasked with specific marketing roles." What methods of integration do each of these vendors provide? REST API, SOAP API, etc?

A164. Methods of integration will be shared with the selected Offeror.

Q165. 2.g: "The Solution must provide the ability to designate a member in a paid subscription or non-paid reward model." Does PLCB have an existing Payment Gateway or prefer a specific Payment Gateway to be integrated with the Application?

A165. The proposed CRM solution will not need to integrate with PLCB's payment gateway.

Q166. 3.a.iii (pg. 3): The RFP states that "the Solution must provide predictive and prescriptive guidance using machine learning to support offer management, discounting, special invitations, etc." Is this required as a base feature or as a future enhancement of the software solution?

A166. This is required as a base feature.

Q167. 3.b.iii: "The calculation of customer lifetime value based on measured behavior, customer churn, consumer life cycle information and the ability to export that data into the PLCB data warehouse for broader analytics." What file formats does PLCB require when exporting data from the system?

A167. PLCB prefers files to be in CSV format.

Q168. Are you looking for user management for Microsoft Active Directory which is synched with Azure AD for Identity Federation? Which application will create the users in Microsoft Active Directory and how will you control the role based access for users in AD and other applications? Is there a need for Multi-factor authentication and Single SignOn?

A168. Offerors should propose their best user management solution.

Q169. Do you already own any Security products today other than the Commonwealths AD and the list of products in Appendix P to provide security controls such as encryption to meet PII requirements listed in Part III 2B.4?

A169. Yes.

Q170. Do you already own or have preferred skills in any Integration products today to help determine the strategy and best integration with the IBMS (Oracle Financials -

EBS) and Oracle Point of Service environments (Appendix O pg 2)? Are demo's expected to show security and integration services?

A170. See A31. Other options will be considered. See also A140 regarding potential demonstration requirements.

Q171. Please elaborate on "2A.4 Provide Identity and Access Management Configuration"? Would you like us to include an identity management products or role based access and fraud detection as part of our solution?

A171. Offerors should include components and capabilities needed for the proposed Solution.

Q172. What percentage of the professional services are expected to be performed on-site during the integration, configuration and implementation?

A172. See RFP Part I, Section I-20 & 28 and to Part III-4, Task 3. Percentage of professional services performed on site will be determined/negotiated with selected Offeror

Q173. May we utilize offshore development resources as a component of our proposal?

A173. Yes; however, see RFP Appendix M.

Q174. Does the Commonwealth have any restrictions against using offshore resources along with US based resources?

A174. See RFP Appendix M.

Q175. What is the expectation around consultants being onsite - could you provide a rough breakdown?

A175. See RFP Part I, Section I-20 & 28, and Part III Task 3 Operational Support. See also A172.

Q176. In section III-5, A, you outline that you will "approve/disapprove all personnel assigned to this project." Can you define the approval process you desire for the Offeror's staff?

A176. *See RFP Part III, Section III-5. B.*

Q177. **What system are your marketing/service emails coming out of? Are you using other systems to communicate with your customers?**

A177. *See A86. For other systems, see A93.*

Q178. **Have you ever been through an IP warm up?**

A178. *This information is not relevant to this RFP.*

Q179. **How are your emails built? Are you using a 3rd party for design?**

A179. *PLCB uses email templates designed by its marketing partner.*

Q180. **Are you using HTML or templates?**

A180. *Templates.*

Q181. **How are you segmenting your customers?**

A181. *Customers self-identify when they sign up for email communication. See A76.*

Q182. **How are your customers opting in/out customers?**

A182. *Customers opt in for email marketing on the e-commerce website. Opting out is part of PLCB's email functionality.*

Q183. **Do you have a campaign calendar that you use?**

A183. *Yes.*

Q184. **Do you send any video or GIF content?**

A184. *PLCB links to its YouTube channel through email. PLCB cannot currently embed GIF. PLCB desires the capability to embed GIFs and videos. See also A163.*

Q185. What part of the email sending process do you spend the most time on/find most challenging?

A185. *The most challenging and time intensive work with regard to emails is structuring templates and layout within parameters of current software, as well as creating additional audience segments.*

Q186. Are you using any deliverability or inbox monitoring programs such as Return Path?

A186. *PLCB receives reports and analytics from bulk email provider Listrak.*

Q187. What is your current testing strategy?

A187. *It is assumed for the purpose of this document that this question is related to email testing only. Email testing is subject line A/B testing.*

Q188. Do you use Google Analytics?

A188. *Yes, PLCB uses Google Analytics to monitor traffic on the FW&GS website.*

Q189. I see email alerts on your app. Do you currently use SMS (text messaging) or push notifications? To what capacity?

A189. *PLCB does not currently use SMS or push notifications, but both are desired functionality. See also A40, A84 and A85.*

Q190. Do you have a short code created?

A190. *PLCB does not currently have a short code, but this is desired functionality.*

Q191. Do/will you create service cases from your incoming (client) Social Media feedback? Would this be helpful for your service goals?

A191. *PLCB does not currently create service cases from feedback, but this is desired functionality.*

Q192. Do you have any ads currently running?

A192. *Yes, PLCB currently runs ads on radio, online, Pandora, TV, print, social, etc.*

Q193. What is your best performing campaign?

A193. *Such information will be shared with the selected Offeror.*

Q194. Are you using landing pages for email capture for your website or for a Facebook tab?

A194. *Yes, PLCB uses a landing page for email capture, but not for Facebook.*

Q195. Will you be collecting any credit card or other sensitive customer data?

A195. *PLCB currently only retains the limited credit card information that is necessary to process payments. PLCB does not intend to collect or retain any other credit card or personally identifiable information in the future.*

Q196. Are any of your marketing/service messages (Email, texts, etc) currently automated?

Example: Do you have a welcome journey?

A196 *Yes, PLCB does have a welcome Journey for email.*

Q197. Is this project fully funded?

A197. *See A108.*

Q198. What is the rough budget for this project?

A198. *See A108.*

Q199. Is this a marketing project or an IT project?

A199. This is both an IT and Marketing project in that the marketing component is contingent upon the IT component.

Q200. Have you developed an ROI model for Loyalty and CRM?

A200. Yes.

Q201. How will you measure success? What are your key performance indicators?

A201. See A61.

Q202. What are your short-term and long-term strategies?

A202. See RFP Part I. Sections I-3 and I-4A.

Q203. Do you have any desired timelines or project delivery goals?

A203 Regarding project delivery goals, See RFP Part I. Sections I-3 and I-4, as well as Part III, Sections III-3 and III-4. Regarding timelines, see A101 and A120.

Q204. Have you ever evaluated or implemented a CRM and or Loyalty platform in the past?

A204. PLCB issued a formal Request for Information for Customer Relationship Management dated August 8, 2012. Thirteen informational responses were reviewed at that time; however, no more recent CRM or Loyalty platforms have been evaluated and none have ever been implemented by PLCB.

Q205. Does PLCB have a CRM and or Loyalty strategy/vision, or does one need to be established (consulting)?

A205. See RFP Part I, Sections I-3 and I-4 A. A more defined strategy will be established with the selected Offeror.

Q206. How do you collect and use customer data today?

A206. *Current data collection methods will be reviewed with selected Offeror.*

Q207. Does PLCB have analytics and segmentation strategy or does it need to be established?

A207. *Analytics and segmentation strategies will need to be established with the selected Offeror.*

Q208. What channels do you currently market to?

A208. *PLCB currently markets through traditional channels, in store, email, social and web.*

Q209. Who is your e-mail service provider?

A209. *See A86.*

Q210. Do you leverage a data management platform, demand-side platform or Data Onboarder?

A210. *Yes, PLCB currently leverages these components to follow our customer journeys. Offerors should propose Solution components they feel relevant to this initiative.*

Q211. How do you define a customer?

A211. *Related to PLCB's retail business, a customer is any person or organization contacting the PLCB either directly or indirectly through any channel for information or to make a purchase.*

Q212. What data do you currently collect from customers?

A212. *See A206.*

Q213. What percentage of your transactions can be matched to a customer?

A213. *Currently, transactions can be matched to less than 1% of retail (individual consumer) customers.*

Q214. What is your e-mail collection rate?

A214. *<1%.*

Q215. Do you work with any third parties for data append services?

A215. *No, but this is desired functionality.*

Q216. How much history would you like to retain?

A216. *Up to ten years.*

Q217. How many models and or segments would you like to bring into your new data environment?

A217. *To be determined with the selected Offeror.*

Q218. Can we get an overview of the PLCB current (technology) ecosystem?

A218. *See RFP Appendices O & P, as well as Attachment #1 PLCB Architecture.*

Q219. Can we get an overview of the PLCB desired (technology) ecosystem?

A219. *Desired technology ecosystem will be shared with the selected Offeror.*

Q220. Does PLCB plan to leverage a service bus?

A220. *See A171.*

Q221. How many (and what) feeds will need to be incorporated into to the marketing database?

A221. *Feeds to be incorporated will be determined with the selected Offeror.*

Q222. How many exports will be required from the marketing database?

A222. *Exports will be determined with the selected Offeror.*

Q223. What are your real time and batch requirements?

A223. *Such requirements will be determined with the selected Offeror.*

Q224. Do you have any required response times or SLA's?

A224. *SLAs will be negotiated with the selected Offeror.*

Q225. Will PLCB Need Loyalty Strategy and Program Design Support?

A225. *Yes, see RFP Part I, Section I-4 and Part III, Task 3.*

Q226. Who will be responsible for the development and hosting of loyalty web pages?

A226. *PLCB's marketing team will manage content development in a third-party hosted environment.*

Q227. Will the program have a mobile app?

A227. *The loyalty components will be integrated PLCB's native mobile apps.*

Q228. Who will be responsible for the development and hosting of the mobile app?

A228. *PLCB's mobile apps are currently internally developed and hosted by Apple and Android. The selected Offeror will be responsible for integration.*

Q229. What level of support are you looking for things like bonusing, campaigns etc.

A229. *See RFP Part I, Section I-4 and Part III, Task 3.*

Q230. **This is focused on CRM set-up, are you seeking any marketing implementation once the system is set-up?**

A230. *Yes, see RFP Part I, Section I-4 and Part III, Task 3.*

Q231. **If so, should we include our recommendations for successful implementation of the CRM system?**

A231. *Yes, successful implementation is an integral part of this RFP; therefore, Offerors should provide such information in the technical proposal submittals.*

Q232. **Will there be a follow-up RFP for marketing support?**

A232. *No, marketing support is an integral part of this RFP. See Part III, Task 3.*

Attachments #1 and #2 are included as separate uploads.