

Office of the Illinois State Treasurer  
Michael W. Frerichs

Request for Information  
E-mail Marketing Solution  
370-800-20-009

Addendum 1  
October 16, 2020

Below are the questions received by the Office of the Illinois State Treasurer (“Treasurer”) and the Treasurer’s responses. The questions listed herein are intended to be accurate representations of the questions received; as such, any errors in usage or spelling have not been corrected. Any capitalized terms that are not defined herein have the meaning set forth in the Request for Information E-Mail Marketing Solution (“RFI”) published by the Treasurer on September 15, 2020.

1. Are there any plans to acquire short codes for SMS messaging in the future?

**Short codes already exist as part of the messaging system.**

2. Are there any plans to communicate via PUSH notifications in the future?

**The Treasurer’s current messaging system has this capability. However, the current messaging system has certain limitations, and the Treasurer would be interested in alternative options a new email marketing platform might provide in this regard.**

3. Do you actively listen and engage on Social platforms /accounts?

**Yes.**

4. Is there any planned integration with a CRM platform / Service platform or Data warehouse in the future?

**Yes.**

5. What platform do you use for CRM and Service?

**Salesforce.**

6. Do you need the ability to trigger email sends from CRM?

**No, the Treasurer simply needs the ability to extract data from its current customer relationship management (“CRM”) system.**

7. What platform do you use for DWH?

**The Treasurer's data warehouse is developed internally using Azure for Government.**

8. Any platforms that might need API integrations?

**All integrations will require application programming interfaces ("APIs") to work. The Treasurer has multiple systems.**

9. Are you using the contact attributes (first name, last name, city, state, zip, interest and demographic data) for any Personalization or any Dynamic Content and Targeting?

**Not at this time.**

10. How many email templates do you have on LISTSERV?

**The Treasurer has four structurally different templates currently in use. Each template has slight variations used for different program communications.**

11. Are the email templates responsive across devices or do these need to be redesigned while migrating?

**Current templates are responsive. An ideal new email marketing solution would allow the Treasurer to design an email campaign that would be responsive across desktop, mobile, tablet, etc. for proper viewing.**

12. Do you use tools like Litmus to determine rendering issues across devices, clients and browsers? If not - are you willing to purchase in the future?

**No, the Treasurer is not using Litmus to test but would be willing to consider it, depending on the cost and benefit to the overall email marketing strategy.**

13. How many assets do you currently have in LISTSERV (emails, images, html, css, javascript)?

**This information is not readily available and the Treasurer does not feel it is relevant to this RFI.**

14. Are there any landing pages that you have hosted on the platform? Will they need to be migrated as well?

**No.**

15. What KPIs are captured today?

**A variety, including but not limited to delivery rate, open rate, number of views, link clicks, popular links clicked, unsubscribes, bounces, and spam reports.**

16. What are the current deliverability problems? Are you having problems with a specific domain?

**None. Due to the size and scale of the Treasurer's e-newsletter email LISTSERV distributed monthly, the Treasurer is always sensitive to ensuring timely delivery of its communications and maintaining a high reputation with email service providers.**

17. Are you sending any transactional emails or are all commercial?

**The Treasurer is a government entity that primarily uses mass email communications to keep the public informed. A minority of the Treasurer's email communications are to customers of its financial services programs (e.g. Illinois Funds, ABLE, "I-Cash" Unclaimed Property).**

18. Is the current preference center (subscription tool) out of the box or is it custom development?

**The Treasurer is currently using a publicly-available off-the-shelf product.**

19. Is the communication mostly B2C or are any B2B communications involved too?

**Communications are mostly business-to-consumer ("B2C").**

20. Do you need any other features like A/B testing, customer journeys, drag and drop segmentation?

**The Treasurer would welcome, and find helpful, additional information on these features.**

21. What is the communications/marketing team size? Will all stakeholders need training?

**There are four members of the Treasurer's communications team, two of which will require access and training. Several members outside of the communications team may require access and subaccounts as well.**

22. Is a campaign calendar used by the marketing team? Is there a need to involve one?

**There is no need for a campaign calendar.**

23. Is there a need approval workflow for marketing assets and communications?

**There is not currently a need, but the Treasurer is interested in learning more about this feature.**

24. Is there a separate DAM requirement? (Digital Asset Management)

**The Treasurer requires only the ability to photos to then embed in the internally-designed email marketing messages. The Treasurer believes this is traditionally a feature with email marketing solutions.**

25. What is your anticipated monthly volume of emails sent?

**Approximately 5 – 10 emails a month to an audience of approximately 700,000.**

26. Social Media platforms are you using and what other "platforms" would you be using?

**The Treasurer has accounts with Facebook, Twitter, Instagram, and YouTube.**

27. Are you using SMS text messaging and, if so, how many monthly messages?

**Short message service ("SMS") text messaging is not being used externally between the Treasurer and the public.**

28. Does your data warehouse have an accessible API? Also, are there any other outside systems (data warehouses, BI tools, etc) we would need to integrate with the email platform?

**This is not a question that the Treasurer can answer without a true scoping question. All integrations will require APIs to work. The Treasurer has multiple systems.**

29. Outside of marketing campaigns, are you using the email platform to respond to service requests?

**No.**

30. What is the budget allotted for a project of this size?

**The budget is still being determined.**

31. If this RFI greenlights a solicitation, what would you anticipate the procurement timeline to be?

**The timeline is still being determined.**