**Script for Live Demonstration and Oral Presentation**

Solicitation No. \_\_\_\_\_\_: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_

**Introduction**

Highest-scoring bidders for Competitive Solicitation \_\_\_\_\_\_-\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, have been invited to give an oral presentation and demonstration of their proposed solution at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

# Overview

# The demonstration script is divided into eight categories, each containing one or more scenarios which describe specific components of the solution the bidder must demonstrate. Each demonstration scenario will list relevant requirements from *Exhibit B – Performance Requirements* of Competitive Solicitation \_\_\_\_\_\_.

Each demonstration item contains the following five sections:

* **Scenario** – describes the situation that we would like to see demonstrated
* **Requirements included in this scenario** include the specific requirements from *Exhibit B – Performance Requirements* that the Agency would like to see demonstrated
* **Questions** – questions we would like the bidder to answer
* **Scoring notes** – for evaluators to capture their notes

Bidders will have three hours to demonstrate their solution as described in the scenarios, and will need to account for five-minute breaks after the first and second hour. Bidders will have 30 minutes before the start of their demonstration for setup. Demonstrations will conclude after three hours; anything not covered in that time will not receive a score.

The scenarios begin on Page 2.

# Subscribers

**Product functionality**: Solution has features and functions that meet the requirements as defined in this Competitive Solicitation.

**Ease of use**: Solution is user friendly.

**Flexibility**: Solution is flexible to meet contract requirements now and in the future.

**Adherence to the script**: Bidder fully addressed script topics.

**Points available: \_\_\_\_20 \_**

**Points awarded: \_\_\_\_\_\_\_\_\_**

## Subscriber access

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| **Scenario:** |
| Demonstrate how subscribers access the system to include:* Signing up for the first time
* Maintaining their account by adding or removing topics of interest
* Deleting their profile
* Creating a password to control access to their profile
* Subscribers’ ability to add multiple email addresses and/or contact information
 |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *2.1 - System shall provide subscribers the ability to create and maintain their own profiles to include providing their contact information, adding and removing topics/categories of interest, and the option to create a password in order to control access to their profile. (M)*
* *2.5 - Service should provide ability to have subscribers add multiple email addresses and/or contact information. (HD)*
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| **Scoring notes:** |
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## Internet bots

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| **Scenario:** |
| Demonstrate the method used to prevent Internet bots from signing up for services. |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *2.6 - Solution must provide a method for preventing bots from signing up for services (i.e., CAPTCHA or double opt-in). (M)*
 |
| **Scoring notes:** |
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# Administration and management

**Product functionality**: Solution has features and functions that meet the RFP requirements.

**Ease of use**: Solution is user friendly.

**Flexibility**: Solution is flexible to meet RFP requirements now and in the future.

**Adherence to the script**: Bidder fully addressed script topics.

**Points available: \_\_\_\_25 \_\_**

**Points awarded: \_\_\_\_\_\_\_\_\_\_**

## Administrative rights and privileges

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| **Scenario:** |
| Demonstrate administrator functions for creating and managing administrative rights and privileges  |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *3.2 - Service shall provide customer agency administrators with an intuitive, web-based administration interface to manage all aspects of the customer agency’s system implementation. (M)*
* *3.3 - Service shall allow customer agency staff to create and manage a multi-level hierarchy of administrative users with different levels of administrative rights and privileges (e.g., an individual administrator can only send messages to subscribers of his or her assigned content) (M)*
* *3.4 - Offer ability for administrators to access any single administrative feature from HTML links so administrators can go directly to the task they want to perform through a bookmark rather than by navigating through the administration interface (HD)*
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| **Scoring Notes:** |
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## Subscriber list and topic management

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| **Scenario:** |
| Demonstrate the administration and management functions of subscriber lists and topics. |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *3.5 - Service shall allow the ability to perform additions and modifications to subscription topics through a “point-and-click” user interface so that changes can be made without programming; Service shall ensure that changes are reflected immediately in the subscription options presented to end users. (M)*
* *3.7 - Service shall allow administrators to cross-list an individual subscription item in multiple categories and sub-categories without additional programming (HD)*
* *3.9 - Service shall allow administrators the ability to add or remove subscribers manually as needed (M)*
* *3.10 - Support the customer agency’s management of select groups of internal and external subscribers by allowing the customer agency to restrict certain topics so that only end users with certain email addresses (or email address domains) can subscribe. (M)*
* *3.13 - Service should have the ability to extract a list of the people currently subscribed in a list and their contact information for customer agencies (M)*
* *3.14 - Service should have the ability to search by name, phone number, email address or other data element in the list (M)*
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| **Scoring notes:** |
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## Content formatting and publishing

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| **Scenario:** |
| Demonstrate the administrative functions relevant to formatting and publishing content  |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* 3*.6 - Service shall allow administrators to create and save default content and formatting for every subscription topic so messages are ready-to-send when content is updated, to include default ‘from’ name and ‘from’ email address, subject line, and message content (header, main body, and footer) (M)*
* *3.8 - Service shall leverage the customer agency’s existing Web content publishing process by providing a mechanism for monitoring website content that:*
* *Detects changes to designated website and prompts customer agency staff to send notifications to subscribers/end users, or automatically sends notifications to subscribers/end users.*
* *Is capable of pulling updated content from the customer agency website into the email notification.*
* *May be configured to monitor content on distinct customer agency web pages on a set schedule. The schedule should be flexible to allow for monitoring by day(s) of the week, hour(s) in the day, and minute(s) in the hour. (HD)*
 |
| **Scoring notes:** |
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# Content Composition and Distribution

**Product Functionality**: Solution has features and functions that meet the RFP requirements.

**Ease of Use**: Solution is user friendly.

**Flexibility**: Solution is flexible to meet RFP requirements now and in the future.

**Adherence to the Script**: Bidder fully addressed script topics.

**Points available: \_\_\_\_25 \_\_**

**Points awarded: \_\_\_\_\_\_\_\_\_\_**

## Creating a broadcast

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| **Scenario:** |
| Demonstrate "out-of-the-box" templates used for broadcast emails and how to adopt the customer agency's look, feel and branding for all content AND demonstrate how the customer customizes its content for broadcast emails |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *1.3 - Service templates for broadcast emails will adopt the customer agency's look, feel and branding for all content AND allow a customer to customize its content for broadcast emails that are completely free of Service Provider logos or other branding and advertising (M)*
* *4.1 - Allow options for building message recipient lists:*
* *Select subscriber lists for multiple subscription topics at the time of send.*
* *Filter recipients based on responses to questions (e.g., zip code) (M)*
* *4.3 - The Service provides a platform for the customer agency to independently create, edit and manipulate written content and graphic elements in bulletins and other emailed alerts and notifications; the Service provides tools and templates for non-technical users to create, maintain and send content-rich HTML emails (e.g., e-newsletters). Service includes a default set of email templates to accommodate diverse communication needs.(M)*
* *4.4 - Service allows the option of composing and sending short versions of messages to subscriber accounts that are configured to receive a shorter format (e.g., SMS/Text Messages).(M)*
* *4.9 - Be capable of automatically publishing message content through social networking and other channels, including:*
* *Ability to systematically publish concise version of email bulletin directly to social media platforms (such as Facebook and Twitter).*
* *Messages pushed to social media platforms will have ability to link back to landing page version of email content for full viewing. (HD)*
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| **Scoring notes:** |
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## A/B message testing

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| **Scenario:** |
| Demonstrate A/B testing function  |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *4.2 - Service shall allow fully automated A/B Message Testing to ensure best-performing subject lines, body content, and/or links are being presented to large audiences. Process to include:*
* *Allow a random sampling of recipient lists.*
* *Ability to compare multiple email sends based on open rate and click-thru performance (M)*
 |
| **Scoring notes:** |
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## MIME formatting

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| **Scenario:** |
| Demonstrate MIME formatting function |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *4.7 - Service shall allow emails to be constructed in MIME Multipart format, allowing recipients to view messages in HTML or plain text based on preferences or email client constraints. (M)*
 |
| **Scoring notes:** |
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# Message deliverability

**Product functionality**: Solution has features and functions that meet the RFP requirements.

**Ease of use**: Solution is user friendly.

**Flexibility**: Solution is flexible to meet RFP requirements now and in the future.

**Adherence to the script**: Bidder fully addressed script topics.

**Points available: \_\_\_\_25 \_\_**

**Points awarded: \_\_\_\_\_\_\_\_\_\_**

## Volume message-handling

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| **Scenario:** |
| Demonstrate systems ability to handle a large number of messages. |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *5.2 - Service shall utilize enterprise-class mail senders with demonstrated ability of sending large quantities of messages. Estimates as high as one hundred (100) million messages per month, and at peak rates could reach one thousand (1000) messages per second (M)*
* *5.3 - Service shall allow for batch delivery when sending an email to a large number of recipients. Service will provide the ability to enter the number of recipients per batch and the time interval for sending each batch until message has been delivered to all recipients. (e.g.,, the same message being sent to a list of 32,000 recipients will be sent in batches of 2,500 addresses in 10 minute intervals until all have been delivered) (M)*
 |
| ***Scoring notes:*** |
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## Subscriber maintenance

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| **Scenario:** |
| Demonstrate automated processes for maintaining subscriber lists, including removing invalid subscribers.  |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *1.5 - Service should provide a method for list maintenance and clean-up (and automation of these functions based on configurable specifications – e.g., a chosen number of hard failures – is preferred). (M)*
 |
| **Scoring notes:** |
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## Importing pre-existing lists

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| **Scenario:** |
| Demonstrate the ability to import pre-existing distribution lists for one-time messages (not on-going subcribers). Address how one-time broadcasts impact the pricing structure. |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *1.7 - Service should provide the ability to import pre-existing distribution lists of recipients using Excel, CSV, or other common formats. (M)*
 |
| **Scoring notes:** |
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# Reporting

**Product functionality**: Solution has features and functions that meet the RFP requirements.

**Ease of use**: Solution is user friendly.

**Flexibility**: Solution is flexible to meet RFP requirements now and in the future.

**Adherence to the script**: Bidder fully addressed script topics.

**Points available: \_\_\_\_10 \_\_**

**Points awarded: \_\_\_\_\_\_\_\_\_\_**

## Delivery reporting

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| **Scenario:** |
| Demonstrate the system reports that provide delivery information |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *6.1 - Service shall provide a usage report that presents numbers of subscribers, emails sent, click-thru rates, open rates, undeliverable message rates (M)*
* *6.3 - Service shall provide a report presenting URL performance, highlighting click-thru rates of individual links showing content performance (M)*
* *6.5 - Service shall provide a report that presents a history of all messages sent, along with the ability to view/resend a message or view a list of recipients and sending status for each (HD)*
* *6.6 - Service shall provide detailed reports for all undeliverable messages (M)*
 |
| **Scoring notes:** |
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## Subscriber reporting

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| **Scenario:** |
| Demonstrate how an agency filters subscribers by topic and category to better understand what domains and organizations are subscribing to which type of customer agency content |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *6.2 - Service shall allow for subscriber filtering, by topic and category, so the customer agency can understand what domains and organizations are subscribing to which type of customer agency content. (D)*
 |
| **Scoring notes:** |
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# Hosting and accessibility

**Product functionality**: Solution has features and functions that meet the RFP requirements.

**Ease of use**: Solution is user friendly.

**Flexibility**: Solution is flexible to meet RFP requirements now and in the future.

**Adherence to the script**: Bidder fully addressed script topics.

**Points available: \_\_\_\_20 \_\_**

**Points awarded: \_\_\_\_\_\_\_\_\_\_**

## Solution

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| **Scenario:** |
| Demonstrate that the system is a commercial off-the-shelf (COTS) product requiring no additional custom programming or redesign. |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *1.1 - The state seeks a commercial off-the-shelf (COTS) product which at launch requires no custom programming or redesign to meet customer agency requirements. (M)*
* *7.1 a. - Solution must be a software as a service platform (SaaS) to allow for future enhancements to be deployed and configured into the system with ease. (M)*
 |
| **Scoring notes:** |
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## Hosting environment

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| **Scenario:** |
| Demonstrate that the minimum requirements relative to the systems environment and connectivity are fully met. |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *5.5 - Emails and/or text messages through the Service must be sent from a mail-sending environment that is never used for commercial purposes or is segregated so that the customer agency’s emails are not mistaken for commercial emails or spam. (M)*
* *7.2 - Host the application in a Tier 2 Data Center environment with redundant connectivity and appropriate physical and electronic back-up systems. (M)*
* *7.3 - Demonstrate Service hosting up-time of greater than 99 percent over a minimum of a three-year period. (HD)*
* *7.5 - Ensure that the customer agency maintains ownership of all subscription data stored by the Service. The Service Provider is allowed to maintain the information for purposes of providing the Service; the customer agency would have full access to the data at anytime. (M)*
 |
| **Scoring notes:** |
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# Miscellaneous

**Product functionality**: Solution has features and functions that meet the RFP requirements.

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**Adherence to the script**: Bidder fully addressed script topics.

**Points available: \_\_\_\_10 \_\_**

**Points awarded: \_\_\_\_\_\_\_\_\_\_**

## Support and training

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| **Scenario:** |
| Demonstrate what training tools are available and support options during business hour and after-hours.  |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* *9.1 - Provide online training to customer agency administrators (at all levels) (HD)*
* *9.2 - Provide an account manager to assist with customer agency setup, administrative training, and ongoing support (M)*
* *9.3 - Provide professional documentation of all system capabilities and setup processes (M)*
* *9.4 - Provide all necessary technical and consulting support to setup the solution on the customer agency’s website (M)*
* *9.5 - Provide unlimited phone and email support during the term of the agreement (M)*
* *9.6 - Provide 24x7 emergency support (M)*
 |
| **Scoring notes:** |
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# Security and privacy

**Product functionality**: Solution has features and functions that meet the RFP requirements.

**Ease of use**: Solution is user friendly.

**Flexibility**: Solution is flexible to meet RFP requirements now and in the future.

**Adherence to the script**: Bidder fully addressed script topics.

**Points available: \_\_\_\_20 \_**

**Points awarded: \_\_\_\_\_\_\_\_\_**

## System and information security

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| **Scenario:** |
| Bidder: Please provide a high-level security diagram for security evaluators for this section. |
| **Requirements included in this scenario (for reference purposes):** |
| Demonstrate your solution’s process to accomplish the following:* + *All security requirements in Section 10 of Exhibit B..*
	+ *All privacy requirements in Section 11 of Exhibit B.*
 |
| **Scoring notes:** |
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