

TEXAS HIGHER EDUCATION COORDINATING BOARD

Statement of Work (SOW) ADVi Chatbot

RFO No. 781-3-29358

Questions and Answers
June 02, 2023

1. Would THECB prefer a siloed chat bot solution or a fully integrated chat bot solution to their NICE CXone contact center as a service?

RESPONSE: The THECB seeks one or more vendors to continue the development and deployment of ADVi as well as provide continuous maintenance and support for the ADVi chatbot including any necessary patching and bug fixes. The solution needs to integrate as a web-based chatbot with THECB's Apply Texas and My Texas Future applications and include maintenance and operations of a comprehensive knowledge base and campaign library.

2. Would the ability to elevate chats or calls to live agents with full context of the bot interaction as well as access to the NICE CXone Expert services knowledge management solution be of value?

RESPONSE: The proposed administrative portal should support escalations to THECB ADVi advisors. The administrative portal should include full context of the bot interaction.

3. Could THECB improve student self-service via search engine optimization enabling student facing knowledge from the NICE CXone Expert system?

RESPONSE: The integrated web-based chatbot with THECB's Apply Texas and My Texas Future should include the associate knowledge base to support student self-service within the websites.

4. Could THECB enhance the student experience by proactively guiding students through their web portal for applying for services?

RESPONSE: The integrated web-based chatbot with THECB's Apply Texas and My Texas Future should include the associate knowledge base to support student self-service within the websites.

5. Does THECB have a mobile application today? Would an integrated mobile application via NICE CXone enhance the student experience for seeking assistance via self-service or agent assistance?

RESPONSE: The THECB does not have a mobile application today. This solicitation does not request the development of a mobile application.

6. Would opening up the same bot service to voice using Intelligent Virtual Agents that work 24x7 assist THECB to enhance the student experience?

RESPONSE: This solicitation does not request voice bot services.

7. Will unifying both digital (chat) and voice bot services through the NICE CXone solution with live agent elevation and full contextual details, end to end reporting be preferred over a siloed solution for chat bot?

RESPONSE: This solicitation does not request voice bot services.

8. What is the engine behind the current chat bot solution? What technology is being leveraged, what version, what supplier?

RESPONSE: The current technology is our current vendor's proprietary cloud-based application.

9. Is THECB open to the vendor providing our own unified chat bot/voice bot solution or do we need to leverage the one that THECB has built?

RESPONSE: The THECB seeks a full-service chatbot provider.

10. Does THECB need 7x24 support?

RESPONSE: The THECB expects that the proposed solution is available to users 24/7. The vendor is responsible for ensuring the solution has a 99% operational rate. The THECB ADVi advisors are available Monday through Friday 8:00am to 5:00 pm CT.

11. What level of reporting is required? Interval, daily, weekly, monthly, quarterly, etc?

RESPONSE: Monthly and yearly reports of student contacts as well as student engagement reports. (Details of the reports to be agreed upon at a later date.) Administrative access to program reports should include aggregate and individual user data.

12. What level of reporting is required? At the issue level, by date and time? Or more macro level?

RESPONSE: Monthly and yearly reports of student contacts as well as student engagement reports. (Details of the reports to be agreed upon at a later date.) Administrative access to program reports should include aggregate and individual user data.

13. What is the expected volume you anticipate daily, weekly, monthly, annual?

RESPONSE: For the class of 2022, nearly 240,000 were contacted. Of that population, over 151,000 users (64% of the population) were actively engaged, meaning they sent at least one text messages to the ADVi chatbot during the annual cycle. Over that same period, ADVi sent this audience over 28,000,000 messages.

14. Is there any seasonality we should be aware of?

RESPONSE: The annual campaign cycles run from August 1 of the initial year to August 31 of the following year.

15. Will you need help developing additional chat bots tied to the reporting and data analysis?

RESPONSE: The proposed solution should provide a managed bot for each student population. Administrative access to program reports should include aggregate and individual user data.

16. Are you looking for both technical resources to create and support the chat bots and consulting resources to analyze data and provide next step recommendations?

RESPONSE: The THECB seeks a full-service chatbot provider.

17. Are you interested in a baseline operational analysis to define process gaps and provide a comprehensive solution roadmap?

RESPONSE: The THECB seeks a full-service chatbot provider. The vendor solution should include a comprehensive product roadmap.

18. What is the current development status of ADVi? What capabilities have been deployed to date?

RESPONSE: The current technology is our current vendor's proprietary cloud-based application. ADVi currently uses AI technology to provide two-way communication with the ability to be reactive (responding to students who reach out with questions) as well as proactive (nudging student regularly to provide support, reminders, and resources via text message. ADVi learns with every interactions and is fueled by a knowledge base and campaign library that is constantly growing. Additionally, ADVi is supported by a team of trained virtual advisors, provided by THECB, who provide extra support to any student who needs it.

19. What information is available on current audience and adoption, including performance metrics and/or user feedback? Currently ADVi has an audience of over _____. The audience breakdown and engagement rates are as follows:

RESPONSE: For the class of 2022, nearly 240,000 were contacted. Of that population, over 151,000 users (64% of the population) were actively engaged, meaning they sent at least one text messages to the ADVi chatbot during the

annual cycle. Over that same period, ADVi sent this audience over 28,000,000 messages.

20. What technology components were used for the initial development of ADVi?

RESPONSE: The technology components are our current vendor's proprietary cloud-based application.

21. Is there a contract budget or a not-to-exceed amount for this project?

RESPONSE: This is a competitive solicitation, and we are unable to provide budget information.

22. Is there currently a vendor under contract providing these services? If so, can you share the vendor's name?

RESPONSE: The THECB currently uses Mainstay as its partner vendor.

23. Are you already using any existing solution/technology for NLP or is it a new requirement for ADVi ?

RESPONSE: ADVi currently uses NLP. This is not a new requirement.

24. Is there any existing solution in place for responsible AI implementation ? If any, please let us know.

RESPONSE: Yes, our current vendor uses responsible AI implementation.

25. What are the technology solution used for telephony and SMS services?

RESPONSE: The technology solution used is our current vendor's proprietary cloud-based application.

26. As mentioned in section 3.1, our understanding is the THECB architecture is deployed on Azure? Does it also include ADVi? Please validate our understanding.

RESPONSE: ADVi is currently operated and maintained outside the THECB architecture by our current vendor's proprietary cloud-based application. If

proposing a custom solution to be owned by THECB, the solution must be built with the THECB's Azure architecture.

27. What is the mechanism to collect the user data which will be further utilized for campaign segmentation?

RESPONSE: The current mechanism is the vendor's proprietary cloud-based application.

28. What platform or solution is currently being used for reporting purposes?

RESPONSE: The current platform is the vendor's proprietary cloud-based application.

29. As mentioned in 3.1 as "If Proposing a custom administrative platform....", we understand that it is a newly envisioned system to support campaign segmentation and other need for future. Please validate our understanding.

RESPONSE: The administrative portal is for our internal ADVi advisors to manage escalation and for reporting. This solicitation seeks a vendor who can develop and deploy the knowledge base and campaign library for segmented populations.

30. Can you please provide some references for THCEB architecture as mentioned in section 3.1

RESPONSE: If a custom administration platform is proposed, the THECB Azure architecture will be provided during the discovery phase of the project.