ABSTRACT

THE EVOLVING ROLE OF A TECHNICAL COMMUNICATOR
IN THE MARKETING DEPARTMENT
OF AN EDUCATIONAL SOFTWARE COMPANY

by Kimberly C. Harper

To satisfy one of the requirements for the Master of Technical and Scientific Communication (MTSC) degree from Miami University, I performed a 16-week internship with Jenzabar, a higher education software provider in Cincinnati, Ohio. The purpose of this internship report is to report on and analyze the importance of effective communication in a newly merged company. The internship consisted of one major project in which Paul Anderson's Problem-Solving Model was used to update and revise content for the Jenzabar CX Web site. Additionally, this report discuses several smaller projects and looks at the limitations and expectations of communication at this company and how it affected the document development process.

THE EVOLVING ROLE OF A TECHNICAL COMMUNICATOR IN THE

MARKETING DEPARTMENT OF AN EDUCATIONAL SOFTWARE COMPANY

An Internship Report

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Dedication

This internship report is dedicated to my parents, Ronald and Betty Harper. Thank you for your supportive words in my weakest hours. I cannot begin to express my feelings of gratitude and appreciation! This whole journey, and I do mean journey, has made me realize how blessed I am to have parents who are willing to help their children work towards their dreams.

Thank you for your financial assistance and for helping me reach beyond the borders of North Carolina to define myself as a woman. Your love and support provided me with the additional sustenance that I needed to keep going when I felt like I could not fight anymore. Daddy—"I held it in the road."

Kimberly

Acknowledgements

1   Introduction

To satisfy one of the requirements for the Master of Technical and Scientific Communication (MTSC) from Miami University, I worked for 16 weeks as a technical communicator in the Marketing Department of Jenzabar, a software provider for colleges and universities. I was hired as a permanent employee, not as an intern, and my internship took place within that context. In this chapter of my report, I give a brief overview of my work environment and explain why I choose Jenzabar for my internship. To help the reader understand the organization of my department at Jenzabar, I also give an overview of the Marketing Department and its goals.

1.1 My Interest in Technical Writing

My first exposure to technical writing was at North Carolina Agricultural and Technical State University (A&T) in Greensboro North Carolina. After graduating I went to work for Volvo Parts North America as an Associate Technical Writer. My education at A&T, job experience at Volvo, and interest in computer technology, prompted me to work on a master's degree at Miami University. At Miami I became increasingly interested in knowledge management and Web site content/development.

I learned of an opening at Jenzabar from the Society for Technical Communication's (STC) Web site. I had two interviews with Alec Ott, the Director of Corporate Communications. After my second interview, I was offered a full-time position on the condition that my first sixteen weeks would count as my internship experience for my degree requirements. This stipulation was something I negotiated for in my contract.

1.2 Introduction to Jenzabar: Company Profile

Jenzabar is an Internet Infrastructure company offering a higher education portal with instructional management and Intranet functionality. Founded in 1998

by Tiennamen Square activist Ling Chai, the company has grown to over 280 employees with six branch offices across America and clients worldwide. Currently, Jenzabar has offices in Cambridge, MA; Cincinnati, OH; Harrisonburg, VA; Hartford, CT; Knoxville, TN; and Ontario, CA. Jenzabar's original product consisted of an educational Web-based portal with instructional management features; but in the spring of 2000, the company merged with four other companies (CARS, CMDS, Quodata, and Campus America) to become the world's largest provider of software solutions devoted to higher education. After the merger, Jenzabar decided to focus on new sales of its two flagship products, Jenzabar EX and Jenzabar CX.

Currently, Jenzabar secures business in two different ways, through sales to new clients or sales to existing clients who may purchase additional training services or upgrades. Most of my work involved responding to RFPs (requests for proposals) from new clients who wished to purchase a new system; so in an indirect way, my work was a major part of the sales process. As you can see in Table 1, the entire process starts when the purchasing organization (usually a college) sends out an RFP to all competing vendors in higher education software.

Once Jenzabar receives the RFP, the sales representative may or may not attend a vendor meeting that the initiating college sets up. Jenzabar then submits the completed response to the initiating college, and if selected, Jenzabar performs a product demonstration. After the product demonstration, Jenzabar is either selected as the final vendor and enters into contract negotiations, or Jenzabar is not selected.

Jenzabar Sales Process	
1.	Initiating college sends out RFP
2.	Jenzabar receives the RFP
3.	Initiating college sets up a vendor meeting.
4.	Jenzabar submits a completed response to the initiating college.
5.	The sales team sets up a product demonstration for the initiating college.
6.	The initiating college selects Jenzabar and begins contract negotiations, which complete the sales process

Table 1: Jenzabar's Sales Process

1.3 Jenzabar's Marketing Department

The marketing department at Jenzabar is a service department that provides all departments in the company, regardless of location, with marketing assistance. Primarily, Marketing works with the sales department in creating various kinds of literature to support the sales team. Our department creates marketing literature that includes product brochures, RFP responses, newsletter articles, press releases, ads in major trade magazines, and PowerPoint slide shows for product demonstrations and trade shows. Marketing literature is intended to inform customers and persuade them of the value of Jenzabar's product line.

The marketing department as a whole follows an "integrated communications" plan for creating successful media. This communication plan focuses on "product differentiation" to target communications to new and existing clients. The objectives of the plan are to:

- Create a Corporate Awareness and Image: Communicate the vision, mission statement, and leadership claim for the marketplace.
- Launch Jenzabar's product vision, the Voyager technology
- Launch the Next-Generation products, Jenzabar's JICS, CX, and EX

A second purpose of the plan is to deploy integrated communication guidelines and procedures to be used by employees in all parts of the company. These procedures are to be followed for interactions with customers, for example:

- Personal contacts (conferences and client visits)
- Telephones contacts (receptionists, call centers, and sales leads)
- Electronic contacts (Web forms and email)

My work included writing responses to RFPs, updating and reworking client Web pages, creating product literature, and writing newsletter articles while using the integrated communications plan for all my documents. In the following chapter, I provide an overview of my internship activities.

2   Overview of my Internship Activities

My internship projects consisted of working on the Jenzabar Web sites; writing newsletter articles and editing the work of others; writing the Administrative Handbook; and writing responses to RFPs. My time was normally spent multi-tasking, with the majority spread between writing RFP responses and working on the Jenzabar CX client Web site (see Figure 1). Overall, the majority of my time (70%) was spent on various writing tasks, while 30% was spent on editing and reorganizing content on the Jenzabar Web sites.

Once Alec Ott, my manager, assigned a writing task to me, I was free to interpret and craft the document as I saw fit. For the most part, I had full control of writing assignments; however, with the Web projects I had only limited control of those projects, because I worked with the department's graphic artist to achieve the defined goals. In the remainder of this chapter, I briefly describe each of these tasks.

Internship Activities Time Chart

Newsletter Articles 10%

RFP Responses 35%

Web Site Work 30%

Administrative Handbook 25%
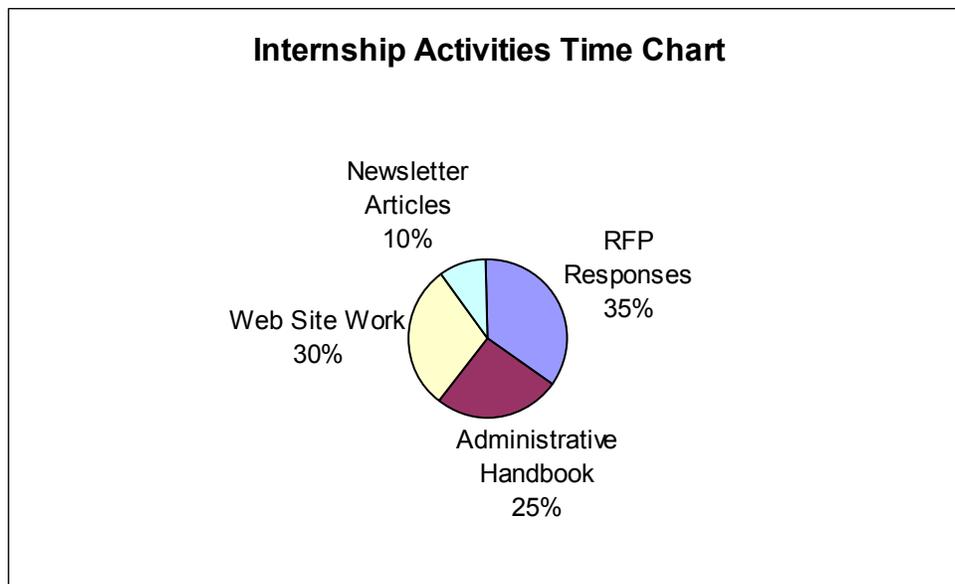
Figure 1: Internship Activities Time Chart

2.1 Updating the Jenzabar Client Web Sites

I worked on the CX Clients' Web site and the Global Web site during my internship. Because the company was re-branding its two flagship products and because the company wanted the Web site to reflect a single corporate identity after the mergers, a graphic artist was creating a new template that would be used for all future Jenzabar Web sites. This circumstance affected my work on both sites, the project proved to be pivotal in the way I viewed the importance of communication and how communication functioned at Jenzabar. I discuss the Jenzabar CX Web site in more detail in Chapter 3.

2.2 Writing Newsletter Articles and Editing the Work of Others

In addition to writing RFP responses, I also wrote newsletter articles. The marketing department was responsible for helping Human Resources with the employee and client newsletters. During my internship, I did not work on any articles for the employee newsletter; however, I did complete several articles for the client newsletter (please see Appendix A).

The client newsletter consisted of product updates and conference information and included several client spotlights every issue. Article 1, Jenzabar Internet Campus News (see Appendix A), represents the type of article that I typically wrote for product updates. Article 2, CINACU - A Cornucopia of New Technologies at Bellarmine University, (also in Appendix A) is an example of the type of article that I wrote when following up on conferences that Jenzabar would host. Client spotlights usually profiled a client who achieved a new level of operating efficiency by using Jenzabar products. Client spotlights differed from other articles as they were assigned to me by Alec and usually came from a glowing client survey or suggestions from our implementation team who worked closely with clients. To write these profiles, after Alec assigned a story idea, I would conduct a phone interview, request a photo of the campus or the participant

and then write my article centered on the topic. Our client newsletter also featured product news and updates about conferences that Jenzabar hosted.

Newsletter writing was both lower in priority and less time consuming than writing RFP responses. I soon learned to put certain tasks on the back burner because of RFP work; subsequently, my newsletter work was often put off until the last minute. RFP work has the number one priority, and items such as newsletter articles were completed on soft deadlines because of the hard deadlines that existed for RFPs.

2.3 Writing the Administrative Handbook

Early in my internship, Alec Ott, my manager and the Director of Corporate Communications, decided that I would create an Administrative Handbook for the Marketing Department. Because of layoffs associated with the corporate mergers, a lot of the company's intellectual capital had "walked out the door." While Marketing had not yet been affected, Alec wanted to preserve the department's history and record its processes in an Administrative Handbook.

The Administrative Handbook is a 25-page document that details the process of responding to an RFP. Specifically, it includes details about writing Jenzabar RFP responses and basic Jenzabar CX and Jenzabar EX product knowledge. It was produced in hard copy and stored in portable document format (PDF) on the Marketing Department's disk space so it would be accessible and easy to locate. I obtained much of the information for the handbook from a five-day marketing meeting that I attended during my first week of work at Jenzabar. As my time at the company grew, I also drew upon my own RFP response writing experiences for additional text in the Administrative Handbook. Readers included the following:

- New technical communicators like me
- More seasoned writers and employees in the Marketing Department

- Other employees who had a need for the documents we write

The handbook was to serve as a knowledge repository; more importantly, it was to help cut training time for new technical communicators.

In this project, I focused solely on one purpose: to create a living knowledge base for employees in the Marketing Department. Writing the Administrative Handbook taught me how important communication is to enhancing an organization's ability to make money. During the time I was working on the Administrative Handbook, the company experienced two layoffs, and I doubt that any new writers will be hired soon. I realized early on that networking was a major form of communicating "important information" and was a critical means for gathering and disseminating information. Employees who leave a company are not available as resources for learning how to do a company's business.

2.4 Writing Responses to RFPs

Writing responses to RFPs was my main job function (please see Appendix B for a sample RFP response). RFPs were assigned to the writers in our department based on the current workload. The process started with a comprehensive review of the RFP. After reviewing the different sections in the RFP, I then moved to answering the client company's questions which using our standard boilerplate when possible and writing my own responses if we didn't have existing boilerplate available for use. For example, I could always expect to answer questions regarding the company history, number of employees, and financial status, of our company. Questions like these were always easy to answer using the standard boilerplate. If our boilerplate did not address a prospective client's RFP question, I would then write an original answer based on my product knowledge, other internal documents, and information I gathered from Subject Matter Experts (SMEs). Any new answers that were created eventually became boilerplate for use with other RFPs.

The bulk of my time was spent responding to client questions and there was hardly any "down" time for conference calls or long discussions about the RFP itself with other stake-holders within the company. Once the RFP reached my desk, I began searching for answers to client questions in previously written RFP responses almost immediately. After some time, I created my own directory of previously answered RFPs and used the search feature on the on file server to search these files by key word. This allowed me to immediately find answers to the most frequently asked RFP questions as well as find specific answers that I had used before.

Writing RFP responses also required that I learn how to use the extended features of Microsoft Word (MS) for formatting such as creating styles and placing graphics within the document. I also had to learn how to use *HotDocs!*, a software program that creates MS Word templates based on a series of predetermined questions. The template created a MS Word file that was outlined to match the RFPs' specified layout. After the template was generated and all the questions were answered, I would then turn my attention to preparing the document for formatting.

Once the document is complete or near completion, the Administrative Assistant would format the document and perform all pre-press tasks, which include formatting text, inserting any spreadsheet or non-MS word items, and performing a page-by-page "visual edit" of the document to ensure visual and typographical consistency. Turning work over to the Administrative Assistant eliminated my ability to make last minute changes, but it also allowed me the time to focus on writing and answering RFP questions.

2.5 The RFP Audience

Writing RFP responses also required an eye for detail and the ability to identify the audience properly. Since most of the responses had a varied audience,

it was important to make sure each audience was addressed properly. A typical audience for an RFP response included:

- College presidents and deans
- Information technology specialists
- Human resource departments
- Accounting departments

The biggest challenge in writing one RFP response for several audiences was constructing the supporting text. The needs of the technical audience were most often met in the functional requirements sections. The real challenge was writing the supporting non-technical matter for college presidents or heads of departments. We were never quite sure of their knowledge about their software needs or the technology necessary to achieve their goals. This made the task of writing technical information for a non-technical audience even harder.

A second requirement of the RFP process was the need to consult SMEs. SMEs played a significant role in the document process because they provided me with answers for questions about the products. As I learned more about the three products I worked with (Jenzabar CX, Jenzabar EX and Jenzabar Internet Campus Solution), I came to know answers to questions that they would previously have answered. It was helpful to learn as much as possible about the products because doing so saved time and reduced the need for SMEs who might take as long as two weeks to respond to a question. Some of the SMEs that I dealt with on a regular basis included:

- Programmers
- Quality Assurance Analysts
- Product Demonstrators
- Training and Implementation Specialists

By the end of the sixteen weeks, I had completed three RFP responses and learned the importance of managing my document writing process. My process was designed around working on the most time sensitive materials first and setting realistic deadlines for my SMEs as well as myself. By doing this early in

the project, I ensured that the most time-sensitive materials would be returned and ready for a deadline. As I adjusted to the communication environment within Jenzabar my work relationship with various SMEs reflected the way in which communication flowed at Jenzabar—very little organization for processes and almost no accountability when the communication process broke down. As a result I learned to ask for things early in the process. In Chapter 3, I will further discuss my internship work with the Jenzabar CX Web site and how I continued to learn about the communication environment at Jenzabar

3   A Detailed Description of Major Activities

In this chapter, I discuss one of the major projects that I worked on during my internship: the Jenzabar CX Web site. While I only spent 30% of my time working on Web projects, I decided to discuss this project because it was a relevant example of how Jenzabar's lack of communication affected all aspects of business. And even though I did not write a lot of text or heavily edit the site's content, I felt that this project was also a good example of how technical communicators can transform confused information into usable knowledge by editing the layout of pages in a web site and reorganizing information into related groups. Additionally, the site reflected the way communication functioned within the company. Jenzabar's overall communication with employees, like the CX Web site, had no real organization when it came to disseminating information to clients. In the remainder of this chapter, I discuss how I approached and set goals for this project, reorganized the navigation bar, edited the text within the Web site, applied the template, and finally conducted user testing.

3.1   Approaching and Setting Goals for the Project

Alec informed me that my project would include putting the Jenzabar CX client site into a new Dreamweaver template and editing the existing content. At the onset of this project, the Web site overhaul was a low priority and had a flexible deadline. Because there was no urgency to begin work, I decided to wait for the completed template that a graphic artist was designing before I began extensive work on the site. This decision proved to be fateful, because revising the site soon became a top priority with an aggressive deadline, a reality that made clear communications with the graphic artist involved in the redesign all the more important,

I approached this project by exploring the existing site to understand its structure and determine what information was the most important to users. When

I examined the site, I concluded users of the site would face an information overload. There was too much information on the site and no easy way for users to determine what was obsolete. With the merger of the companies—Jenzabar, CARS, Quodata, and Campus America—the problem continued to grow. I was presented with a challenging situation: I began working on a site that already existed but that had no coherent content structure.

After some research, I found a set of guidelines on the Jenzabar file server that helped me frame the context for the site. The Web site was to adhere to the 3/30-second rule—meaning that the site should begin loading in 3 seconds and be completely loaded in 30 seconds. The site was to disseminate appropriate content from content managers across the country to their intended audiences (primarily new and existing clients, but also employees of each of the merged companies). Because the corporate environment had changed so much, I found a contradiction in the following loosely stated guideline "The site should make use of the knowledge that users bring with them when they visit." In theory, that makes sense, but in reality, many users were coming to the site because they lacked knowledge. The CX Web site needed to fulfill the needs of our primary audience, our clients, but not all clients shared the same level of knowledge. The Web site's content did not meet these standards or consider gaps in client knowledge.

After this preliminary evaluation, I set three goals for my work. My first goal was to fully understand the existing site to ensure that any changes I made would benefit users. Second, I wanted to make the navigation bar more usable by reorganizing its headings so that content managers would more clearly understand what types of information should be submitted for inclusion in various locations on the site. Third, I edited and reorganized texts on the site based on the new navigation headings. Doing this ensured that added pages would be consistent with the navigation headings as well as be relevant to the way Jenzabar conducted business.

3.2 Understanding the Existing CX Web site

Jenzabar has Web sites for all of its individual products as well as a hierarchy for the order of the sites. The company site, Jenzabar.Net, was topmost in this hierarchy and served as a customer's initial point of entry to the various Jenzabar product Web sites (Jenzabar CX, EX, PX, and QX). It included press releases, general sales and contact information, brief product descriptions, and an overall introduction to the services that Jenzabar offered.

Various people depending on the regional location of the office maintain the four product Web sites Jenzabar uses to communicate with its clients. For example, Jenzabar CX is based in Cincinnati, OH; therefore, the Cincinnati office maintains the site. These sites helped clients retrieve product information such as product-specific news, upgrades to their software, downloads, and access to listserv archives. I worked on the Jenzabar CX Web site, which was one of these Web sites.

As I examined the structure, I determined the current state of the site resembled the pure Web structure mentioned in William Horton's *Designing and Writing Online Documents*. Horton states,

> In a pure web structure, every topic is directly linked to every other topic. Linking everything to everything else would seem to solve the organization problems. Free-form web structures can either provide knowledge or just propagate the creator's confusion. Remember, raw facts may be highly interrelated, but knowledge is well organized. (174)

For example, on the left navigation bar shown in Figure 2, there is a link labeled Downloads. These are the same downloads that are accessible by clicking on the links under the Recent Updates heading in the main pane. Additionally, users can access the same information by clicking on the Documents link, another example of how the original site navigation promoted user confusion: different links in the same navigation bar led to the same information. You can see that at first the site appears to be organized, but when examined closely, its problems come to light.

The site is just a scatter of information that does not guide the user or group relevant chunks of information together.
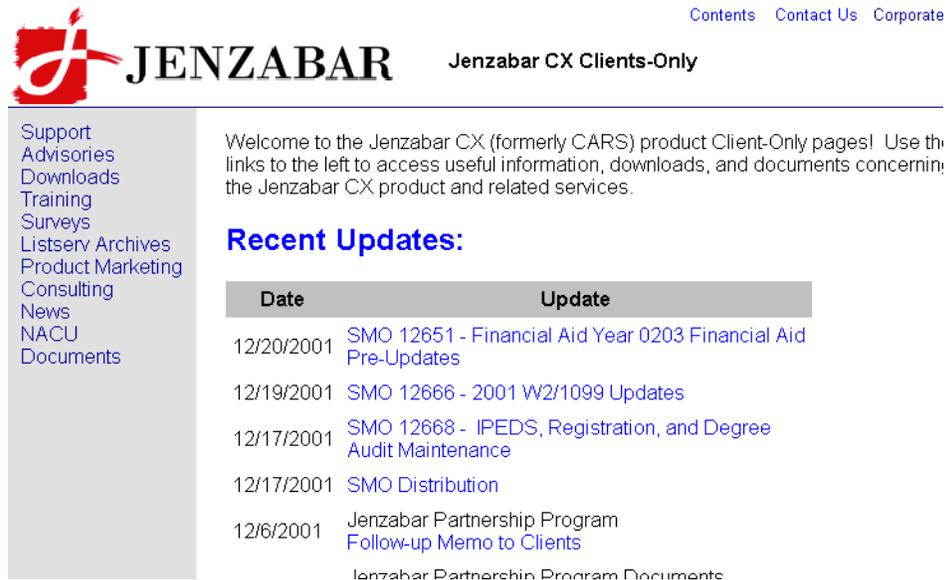
Figure 2: Old CX Web Site

Another problem you can see in Figure 2 is that the heading, Recent Updates, in the main pane does not provide the user with any type of information about the type of update. The user has no way of knowing, other than by experience, that Recent Updates is a list of system modification downloads for the software, again demonstrating the free-form Web structure that Horton describes in his book *Designing and Writing Online Documents*.

3.3   Evaluating & Revamping the Navigation Bar

Fixing problems with the navigation bar was my first focus with the Web site because it served as a road map for users. In addition to the problem I discussed in the previous section (there was too much information packed into very ambiguous heading titles), the navigation bar itself used no visual cues to

show a hierarchy of information to help guide users. The navigation headings were not grouped together to intuitively guide the user and users could not determine at a glance if any one particular heading was more important than another. They had no way to know if information was supplemental or crucial or to determine where time-sensitive material was located within the site without actually exploring the site.

For example, in Figure 3, there is no white space between the headings on the navigation bar nor is the hierarchy of the information shown in any other way though a hierarchy is intended. The organization assumes that the user automatically knows what each heading encompasses. For example, the user has no way of knowing that the items under Documents are actually "Downloads" nor does the user have any information about what type of documents are available.

Figure 3: Old CX Navigation Compared to New CX Navigation

To design a solution, I focused on the tasks that the user would perform while at the site. This allowed me to understand what the user needed from the site. Topics were initially organized into the following categories: Support,

Advisories, Downloads, Training, Surveys, Listserv Archives, Product Marketing, Consulting Services, News, NACU (National Association of Cars Users), and Documentation (see Figure 3). Figure 3 also shows how the topics were reorganized for clarity.

Because most clients visit the site because they need to download information, submit a technical request form, or search our archived listserv files, the new navigation bar took this into consideration. I put this information in the top part of the navigation bar to help the user identify exactly where the most frequently used information was located within the site as well as to help group related information together relative to its urgency to the user. For example, submitting a technical support form is more important or urgent than searching for listserv files, so it makes sense to have them under them under different headings.

This solution made things clearer because users now had a foundation for separating information into related chunks of well-organized knowledge. Again, as you can see in Figure 3, previously all information was listed in a non-hierarchical format, but with the new organization users could easily determine that Listserv Archives, Product Information, NACU, White Papers, and Client Surveys were additional (but less important) resources that they could use. CX Support Home and Support, Training, Downloads, Advisories and Product Documentation were items that had information that was considered vital to what was happening with the product.

For additional clarity, I omitted the heading "News" because most of the information that was listed under that heading included press releases and product information. Product information and updates could be found under the Product Information heading on the navigation bar and press releases which were originally under "News" were now sent out in mass emails to clients, included in the client newsletter, or listed the Jenzabar.net site.

3.4 Editing & Revising Existing content on the Web Site

Once the navigation bar topics were identified and organized, I turned my attention to determining the necessity of certain information within the site. Initially, new pages were created based on the first template the graphic artist designed; however, by the time the final template was ready, a lot of the original information on the site was no longer relevant to the way Jenzabar conducted business with CX clients. Obsolete pages embedded within the site needed to be archived and removed.

Fortunately, most of the information that was omitted from the site could not be readily seen from the navigation bar and so I didn't expect users would be greatly affected by the changes. I omitted most items based on Alec's knowledge of the site. Under his guidance, I deleted pages that dated back to 1998, 1999, and 2000, long before the company mergers. I also edited existing text based on what I felt was important to convey to the user. For example, the site I made it a point to delete a lot of flashy marketing prose and choose to leave only the technical information users needed on several pages.

3.5 Responding to Template Changes

In addition to regrouping the navigation bar and editing the content on the site, I was responsible for applying the template to the site. Halfway through the project, the graphic artist decided to change the template she had originally provided me. After I had updated the site using the second version of the template, our designer created a third and final template. While these changes did not affect content or organization, these discretionary decisions came without warning and caused me to do a lot of re-work with the CX site. At one point in the process, the style sheets created by the graphic artist were not being recognized by my version of Dreamweaver. This required that I re-create every style from the final template manually so I would be able to meet the deadline that Alec and the company's management had set. Because I had to manually apply the template to each page in the site, I learned how to manipulate templates and create my own

styles, which served me well when responding to other formatting issues. Figure 4 reflects the final template for the site.
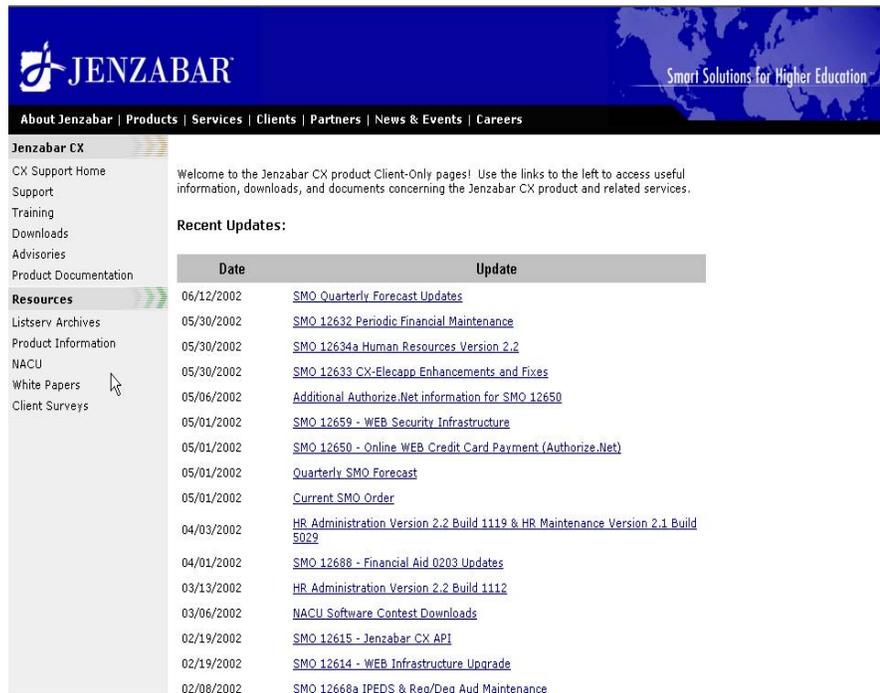
Figure 4: Current CX Site

3.6 User Testing and Evaluation

User testing and evaluation were not managed at Jenzabar as steps in a formal process and, as a result, is ongoing. Testing the site was different from what I had anticipated in that it focused solely on the technical functions of the site rather than its ability to meet users' needs, something that was the exact opposite of what I learned in the MTSC program.

The IT department, Alec, and I were responsible for testing the site. We copied the site to a test location and found several technical problems that were fixed before the site was published to the Web. The IT department provided no real feedback about the site design or the content. Instead, it was up to Alec and

me to determine what was wrong and what might need rethinking. We checked for technical functionality such as links, graphics, and server issues. At this point, by management standards, the site was considered finished and so it was implemented (published to the Web) for Jenzabar CX clients to use. Management felt that the important thing was to have *something* for clients to see.

3.7   Publishing the Site to the Internet for Clients

The CX site was introduced on a Friday afternoon and things ran well until users with Netscape Navigator tried to access certain pages within the site. Certain versions of Netscape Navigator did not support cascading style sheets, which caused a problem in how the site appeared when viewed with Netscape. Apparently, two style sheets were linked to the site's template, thus confusing the browser. After a few weeks, we began to get more feedback from users, which turned out to be user testing (just not the structured, controlled kind I had envisioned).

We learned that while most clients liked the general layout of the site, many requested that dates be added to several pages to help them track new information. They also requested that we change the order of items in our System Modification Order (SMO) list. At first, the most recent update was at the bottom of the page and the oldest was at the top. Our clients preferred to have the most recent download at the top rather than at the bottom.

Overall, management was pleased with the new design. Lack of user contact during the project made it difficult to create a true user-oriented site; however, the finished product was much better than what we started with. I think it continues to fall short in the area of content overload, but through continuous user feedback and modification to the site, I try to find ways to make sure the content is usable while troubleshooting for any technical problems.

In conclusion, this project was an excellent example of the organized confusion that existed at Jenzabar and it served as the catalyst for me to further

understand how communication functioned at Jenzabar. In the following chapter, I will describe the communication environment at Jenzabar and how it affected the processes in the Marketing Department.

4 How Communication Functioned at Jenzabar

From my courses in the MTSC program and my work experiences, I learned that the most successful companies and managers are effective communicators. My work experience at Jenzabar made me realize that effective communication exists when upper management has a clear vision for the organization and articulates that vision to its employees. In this chapter, I discuss how internal communication affected my job in marketing and how communication failed to serve the company. I also discuss JoAnn Hackos's Process Maturity model and how it can help technical communicators assess their communication environment—something that was key to understanding Jenzabar's communication environment. Finally, I discuss what I learned from my experiences at Jenzabar.

4.1 A Clear Vision

A clear vision for an organization allows employees to understand the goal of the owners, managers, and clients. Jenzabar had a vision, but it was unclear almost to the point of confusion. As mentioned earlier, Jenzabar was a company with four different corporate personalities and no true unity after the merger. Jenzabar did not attempt to mold the companies into a new "Jenzabar family" or use change management strategies to help employees adapt to a new corporate identity. In fact, Jenzabar did not deal with this clash of corporate cultures until six months to a year after the merger. As a result, many people knew they were Jenzabar employees but still acted like they were working for their old companies. For example, until early 2002, all of the Jenzabar client sites maintained their old client interfaces on the Web, two years after the company merged in 2000. This crucial detail affected the way in which employees interacted with each other and how business in the company was conducted. This

confusion was also apparent to customers in the structure and appearance of the company web site.

While the integrated communications plan used in the Marketing Department might have been helpful in addressing these problems, it was the only business unit that adhered to the plan. As mentioned in Chapter 1, the plan asked that all employees in the company use communication guidelines and procedures. This means that every personal contact (conferences and client visits), telephone contact (receptionists, call centers and sales leads), and electronic contact (web and email), would present Jenzabar as a unified front. Additionally, this plan could have been helpful in getting all employees on the same page. In the remainder of this chapter, I discuss Jenzabar's communication practices with its employees and clients. Finally, I discuss how JoAnn Hackos's Process Maturity Model helped me later understand how Jenzabar's communication environment affected my work within the Marketing Department.

4.2 THE GOSSIP MILL AND EMPLOYEE COMMUNICATIONS

At Jenzabar, the most consistent way employees communicated was "at the water cooler." The "grapevine" was also impacted by the fact that the two major products, Jenzabar CX and Jenzabar EX were at times pitted against each other. As a result, lively gossip about who was being laid off, what happened at a certain meeting, or how a Jenzabar CX employee said something to anger a Jenzabar EX employee, not to mention whether PX & QX were being phased out, was passed around the company "grapevine."

This active gossip mill arose in the absence of the corporate communication line that was desperately needed within the company. Management did not seem to understand the importance of sharing company news with employees. Instead of having a regular form of communication such as a newsletter that was distributed consistently, information was disseminated on an "if-you-ask basis." Although Human Resources was very good at keeping

employees up to date with changes in benefit programs, upper management shared relatively little information about decisions affecting Jenzabar products, the information that employees needed the most to do their jobs well.

4.3 Client Communication

Client communication was probably the easiest thing to maintain at Jenzabar; however, it was severely affected by the lack of a uniform corporate culture and effective communication between management and employees. For example, when clients called in for helpdesk assistance, associates would say the company's old name rather than saying "Jenzabar Helpdesk." Many employees who were embittered by the merger and layoff of old friends refused to let go of old loyalties. The integrated communication plan could have helped bridge this gap. The lack of company direction and communication with employees regarding product lines hampered the preparation of most if not all of our RFP responses. It seems that we never had current product information unless we actively sought out Product Managers, yet we were expected to know what "new" functionality would be in the product for the next quarter. As a result, many of our RFPs lacked detailed explanations of Jenzabar's functionality and the responses were not as clear and concise as they could have been. The Web projects were equally affected because of the lack of direction from executives.

All of these factors greatly affected the work that the Marketing Department did on a daily basis and my ability to effectively create useful documents. In looking at the communication problems that existed at Jenzabar, it would be beneficial to apply JoAnn Hackos's Process Maturity Model to the organization (see Table 2). The Process Maturity Model helps technical communicators assess the maturity of technical publication departments. In particular, the model was established to help technical publication departments assess their level of operating functionality while developing goals that will help them move from one level to the next level.

Level	Description	Publications Project Management	Transition to the Next Level
Level 0 Oblivious	Unaware of the need for professionally produced publications.	None	Staffing with professional technical communicators
Level 1 Ad hoc	Technical communicators act independently to produce publications with little or no coordination. They may be assigned to different technical managers	None	Development of a style guide
Level 2 Rudimentary	The beginning pieces of a process are going into place. Some coordination occurs among the technical communicators to assure consistency but enforcement is not strong	None to very little	Introduction of some project planning
Level 3 Organized and repeatable	A sound development process is in place and being refined. People are being trained in the process. Project management is in the beginning stages with senior technical communicators learning the rudiments of estimating and tracking	Introduction of project management	Strong implementation of project planning
Level 4 Managed and sustainable	Strong project management is in place to ensure that the publications development process works. Estimating and tracking of projects are thorough, and controls are in place to keep projects within budgets and schedules. Innovation gains importance within the strong existing structure.	Strong commitment to project management	Beginning of the implementation of more effective processes
Level 5 Optimizing	Everyone on the teams is engaged in monitoring and controlling projects. As a result, effective self-managed teams are becoming the norm. Innovations in the development process are regularly investigated, and teams have a strong commitment to continuous process improvement.	Strong commitment to project management and institution of self-managed teams	Strong and sustainable commitment to continuous process improvement.

Table 2: Process Maturity Model by JoAnn Hackos

Based on Hackos's model, Jenzabar operates between Level 0 and Level 1. Had I known this prior to starting my projects, my expectations about the ease and clarity of planning my documents would have been lower, and I would have been better prepared for the chaotic communication environment. For me, I think Hackos's model brought my struggles with internal corporate communication and external client communication full circle. The model helped me better understand how these two different types of communication cannot successfully exist without each other. As hard as we tried in our department, our external client communication never met the expectations set by management because internal corporate communication did not function properly.

I think as Jenzabar progresses to process maturity, the documents we write in the Marketing Department will reflect Jenzabar's communication growth. In retrospect, I think reviewing the Process Maturity Model before starting projects would better prepare writers for understanding how communication environments can affect the way a division approaches its writing projects. The Process Maturity Model could also have helped me determine gaps in the department's document planning process. By being able to determine the maturity of the department, I would have been able to side step some of the communication barriers that existed at Jenzabar.

In the end, I think Jenzabar still has a lot of growing to do, but just like the Jenzabar CX Web site was reorganized for clarity and purpose, so too can Jenzabar's overall communication environment be reorganized to better suit the employees and clients on a regular basis.

Works Cited

Hackos, Joann T. Managing Your Documentation Process. New York: John Wiley & Sons, 1994.

Horton, William. Designing and Writing Online Documentation. New York: John Wiley & Sons, 1994.

Wick, Corey "Knowledge Management and Leadership Opportunities for Technical Communicators." Technical Communication 47:4 (2000): 515-529

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Appendix A: Newsletter Articles

Article 1:Product News

Jenzabar Internet Campus News

By Kimberly Harper, Technical Communicator

As technology continues to change the global world economy it also continues to change and heavily influence the way administrators, professors, and students work toward the shared goal of educating each other. In today's global education system, all constituents at institutions of higher education are much more technologically savvy. Jenzabar has recognized that today's constituents have a higher technical aptitude and therefore has responded with the *Jenzabar Internet Campus*. With the i[3] strategy, the *Jenzabar Internet Campus* exponentially creates value for customers by focusing on

- ❑ Integration,
- ❑ Intelligence, and
- ❑ Internet.

The Jenzabar Internet Campus Leadership Team—A Deep Commitment to Serving Customers
When asked about the progress and development of the *Jenzabar Internet Campus*, Project Coordinator Barbara Calhoun stated, "I am excited about this project. The creation of the *Jenzabar Internet Campus* Leadership Team has been a tremendous help in creating a product that suits the needs of customers. At the start of the project each leader was solicited for his/her view of the tasks and responsibilities for a given area. An overall project plan was prepared based on the responses. The leadership team meets weekly to discuss the progress of the *Jenzabar Internet Campus*. We are making tremendous progress and look forward to beta testing."

Status/Timeframe
The comprehensive functionality of Jenzabar's Internet Campus Solution will be released in a phased approach at various intervals over the next year and a half. Phase 1, which is on track to go to Beta on May 31, 2002 has many system-wide features that will enhance users' capabilities regardless of their location. The beta period is expected to last for at least two months. General Availability (GA) is expected by September 2002. The Jenzabar Internet Campus will support the following:

- ❑ Basic IC Portal functionality (portlet management, personalization, administration, calendar, email)
- ❑ For *EX* and *CX* sites: Student CRM and Faculty CRM modules, which will consist of the existing Web-based functionality already present in each of those ERP areas. In addition to the Student and Faculty CRMs, all pre-existing Web-based functionality will be made available.
- ❑ For *PX*, *TE*, and *QX* sites: A single-login link from the Internet Campus to the ERP Web system
- ❑ Improved *LMS* system (for course management)
- ❑ Existing APIs
- ❑ MS Exchange for collaboration

Beta Sites
After speaking with several schools regarding their participation in Jenzabar's beta testing, the development team is looking forward to working with clients to see how Jenzabar's Internet Campus will continue to expand their ability to help constituents. Sean Casey, of the Cambridge office, is the lead Implementation Specialist for Jenzabar's Internet Campus. Sean is now finalizing agreement and evaluation forms and processes, and he will be working with the beta sites up to and during the beta period. For more information about Jenzabar's Internet Campus, please visit us at http://www.jenzabar.net/about_jbar/internet_campus.html

Article 2: CINACU - A Cornucopia of New Technologies at Bellarmine University

By Kimberly Harper, Technical Communicator

CINACU 2001 was hosted by Bellarmine University in Louisville, Kentucky. Roy Stansbury, Administrative Computing Manager for Bellarmine, served as the conference coordinator. "Our theme for this year was A Cornucopia of New Technologies." We wanted to share our successes with other Jenzabar CX users and learn about theirs as well." The goals of the conference were to address user needs and also show how Bellarmine successfully combined Jenzabar CX with new technologies. So far Bellarmine has created a class scheduling system, a phone directory, and an extensive ID system for students and faculty at the university. Other hot topics for discussion at the conference included co-curricular transcripts and the use of IPEDS for reporting.

Roy Stansbury

The conference was designed to help Jenzabar CX users increase

their product knowledge, network with other users, and increase individual skill sets. CINACU attendees were presented with the opportunity to learn in-depth information about their particular fields of expertise-all from the user's point of view. The environment was relaxed and engaging. It also gave participants a chance to dialog with Jenzabar associates. Attendees participated in breakout sessions that covered topics such as admissions, financial aid, institutional advancement, and the registrar's office. Stansbury attributed this year's CINACU success to the fact that so many people attended. "I was really satisfied with the number of people who attended. Some folks came a long way, and most attendees were pleased with the freshness of this year's conference."

Bellarmine University

CINACU Attendees Share Successes

Barb Baker, Director of Software Development at Indiana Wesleyan University, attended CINACU to learn about the different aspects of Jenzabar CX. She came home with much more. "The IT track was very helpful. The session leader, Dan Lukac, engaged in useful follow-up discussions regarding many topics that were initially addressed at NACU 2001." Barb also thought the environment was excellent for networking and learning. "This year it seemed like many of the schools were in the same place for implementation of modules, which made for good conversations. It was extremely helpful to have that time for networking. Overall I found the conference to be helpful and fun."

Genie Wambaugh, Director of Institutional Planning and Effectiveness for Thomas More College, found CINACU to be very informative and beneficial. She found the IPEDS focus very worthwhile, since few conferences focus on institutional research information.

Barb Baker

"Reporting is my focus, and IPEDS is a very large part of that. Some of the things that Jenzabar put on their menus have really been helpful in handling reports," says Genie. "I attended the Registrars' track and later in the afternoon took a tour of the campus. During the tour some specific questions that I asked were addressed while standing at a computer terminal in the Registrar's office. I received very individualized help as well as networked with other Jenzabar CX users." Next year's CINACU will be held at Indiana Wesleyan University in Marion, Indiana.

Appendix B: Sample RFP Response

October 17, 2002

Michael Wahl, Executive Director
Michigan Community College
Virtual Learning Collaborative
222 North Chestnut Street
Lansing, Michigan, 48933-100

Dear Mr. Wahl:

Jenzabar is proposing the Jenzabar Internet Campus Solution (JICS) and the Leaning Management Solution (LMS) for the Michigan Community College Association. Jenzabar has the resources to ensure the RFP requirements are fully met with a system that meets all the functional and technical requirements set forth in your Request for Proposal.

Our integrated course delivery system empowers faculty and students alike. Faculty can administer courses, interact with students, and streamline the learning process. Students can organize, communicate, and increase their breadth of learning opportunities. Jenzabar currently provides academic, administrative and course management solutions to over 1000 institutions of higher education.

Because of the high degree of advanced technology in this proposal, we welcome the opportunity to make a personal presentation to your administrative staff. This will allow your staff to have any questions or technical concerns answered before entering the final evaluation phase.

Thank you for giving Jenzabar an opportunity to propose our solution to your information management needs. We look forward to working with you on this project.

Sincerely yours,

Edward O'Donnell Jr.

Senior Account Executive

EO: ls

Jenzabar's Internet Campus Solution for the Michigan Community College
Virtual Learning
Collaborative
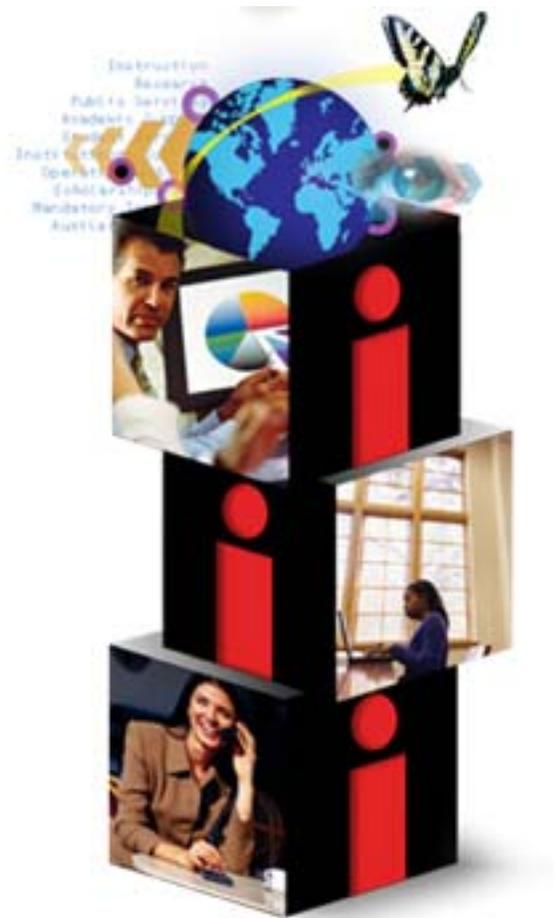
For Information Contact:
Edward R. O'Donnell, Jr.
Senior Account Executive
4191 Oxford Reilly Road
Oxford, Ohio 45056-9008

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Cambridge, MA 02139
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Table of Contents

A. Executive Summary

Web technology has changed the way students access education and the way institutions deliver their services. As a result institutions are faced with a growing set of challenges as they seek to serve their prospects and students. In order to aid institutions in this challenge, Jenzabar proposes the Jenzabar Internet Campus Solution (JICS) and the Learning Management System (LMS) as the foundation of an integrated course delivery system for The Michigan Community College Association.

The system proposed is capable of performing the administrative and educational functions specified in the Request for Proposal. Jenzabar's integrated course delivery system includes distinct learning technologies that empowers faculty members to administer courses, streamline the learning process, and enable students to organize, communicate, and increase their individual learning opportunities.

The Internet and World Wide Web also provide an unsurpassed degree of opportunity as institutions seek ways to meet these emerging challenges. Jenzabar provides institutions with access to technology, tools, and services that allow them to respond to increased competitive pressures and serve their customers (students) better than ever. As the Internet and Web based applications flourish, Jenzabar provides superior technologies that leverage emerging technologies. By providing these technologies Jenzabar enables institutions to function effectively today as well as manage future change.

Every institution will be able to look at all students, nationally as well as internationally, as potential candidates for enrollment in the distance learning process. Every institution is able to deliver information via applications that support Web-centric delivery of the functionality they determine is important for their specific strategy. Education can be delivered without regard to geography, as institutions, via the Web, are able to support distance learning and the non-traditional learner.

The Jenzabar Vision

Our product vision has evolved after spending the last 12 months determining what higher education wants in the way of technology solutions. We conducted extensive market research among our more than 1,000 installed

clients (more than 10,000 learners and faculty members). We also had ongoing discussions with leading research analyst groups, such as the Gartner Group, Dataquest, and Eduventures.

Our research showed that our clients want Intelligent, Integrated, and Internet software. They want *intelligent* software to help them make decisions, rather than simply store data. They want front-end/back-end *integration*. Our customers want a more unified and collaborative campus experience by integrating their front-end faculty and learning functions with back-end administrative functions, and they want more *Internet* connectivity to meet the challenge and demand of Web-generation students.

Prior to the Web's emergence, students traveled up and down the hall, from department to department, just to sign up for a class. Now, institutions want to provide their students with a unique user-centric experience, seamlessly merging all the processes and relevant information that a student needs to know into one point of contact.

Jenzabar's **i³** product strategy encompasses the three "i's" of Intelligent, Integrated, and Internet. Jenzabar's **i³** strategy is designed to help our clients advance their Internet capabilities one hundredfold, and truly unleash the power of their ERP systems, connecting all constituent groups together. Let me now summarize how we address the three i's.

Intelligent

Our Enterprise Smart Portal, now called the Jenzabar Internet Campus™, combines the sometimes-overwhelming amount of information and activities involved with the campus into one single source. While our enterprise solutions effectively support business processes, the *Internet Campus Solution* delivers a user-specific experience to constituents, offering services relevant to the individual user and transforming the learning community. Thoughtfully engineered to be a personal organizer and intelligent tool, it's more than simply a gateway to all the essential information learners, faculty, or administrators need.

Integrated

Our Constituent Relationship Management (CRM) software (dramatically more than a traditional ERP) provides staff with immediate and integrated access to complete

student profiles—without having to move from system to system. It treats the admissions, financial aid, and academic records departments as a single entity. Our integrated administrative software is designed to manage relationships with all of the enterprise's constituents. Our CRM provides data consolidation and mining and the ability to capture vital constituent information at the point of contact, whether by telephone, fax, e-mail, or the Web. CRM stores this information in a central database, but even more, it delivers sensible business intelligence to the right officers, so they can make the right decisions.

Internet

Yesterday, customers invested heavily to automate administrative functions so they could bring their campus to the world. Today, our Intelligent, Integrated, and Internet campus solution brings the world to the campus. And when the world comes, it will get individualized Web services. Take registration—it's now a one-stop deal. Jenzabar combines all those formerly separate tasks into a seamless process. Students can plan a schedule of classes, register, pay their bills, access their classes' homepages, review their syllabi and assignments, and get an email greeting from their teachers.

The Jenzabar Approach: Implementation and Client Services

The Jenzabar philosophy is customer-driven and customer-focused and we understand that service is our most important product. Only by providing valuable service to our clients will we continue to exist as a company. With several years of higher education experience within Jenzabar we understand the issues and challenges that face institutions today. We invest daily in technology to ensure that administrators and faculty have the latest tools at their fingertips and are protected from the problems that systems can cause.

Jenzabar offers a complete set of services designed to ensure that you maximize your investment as quickly as possible. Jenzabar has designed its service offerings to focus on the specific needs of higher education and to ensure that your partnership with Jenzabar is sustained through periods of institutional change. Jenzabar client services include:

❑ Implementation and Project Management

❑ Support Services

❑ Consulting Services

❑ Educational Services

❑ Documentation

Because Jenzabar is customized to your specific needs and based on intimate knowledge of your institution, implementation is faster and easier. Jenzabar offers several options for service agreements, as well as consulting contracts. The key element in this support organization is your Jenzabar account team:

❑ Account Executive: Account Management issues.

❑ Project Manager: Implementation issues.

The members of this team work directly with you to manage the on-going support of the Jenzabar solution. Their job is to focus Jenzabar resources to your maximum advantage.

Your account team is part of a larger support organization that includes Implementation Specialists and the Response Center. This balanced organizational structure combines local, regional and corporate support. You benefit from the personalized attention of your account team, from the larger Jenzabar resources located at a centralized location, and from headquarters' resources such as product development and research personnel.

During regular business hours, the Jenzabar Response Center offers support through telephone, fax, and Internet, so you can easily log a support issue. After hours, Jenzabar has procedures in place to ensure your critical needs receive the attention they require.

Jenzabar provides extensive education and training to teach customers how to use the Jenzabar solutions for efficient operation. Training includes courses for all levels of personnel and users within your institution.

Pricing Overview

Jenzabar pricing for all solutions and services reflects our standard pricing methods. All software, maintenance, and support prices proposed are based on current list prices. The system architecture is based on standard products available through regular commercial channels.

Beginning at the point of contract execution, out-of-pocket expenses incurred by Jenzabar on behalf of The Michigan Community College Association and the project are billed at actual cost. The proposed pricing, configurations, and terms quoted are valid for 90 days from the date on the front cover of this proposal.

B. Company Overview

Employee information

Jenzabar employs 220 full-time people of which 103 are involved with product development. The following list shows the number of Jenzabar employees in various categories. Created from the merger of several companies, Jenzabar as an entity is slightly less than two years old. CARS, the company that developed the software known as Jenzabar CX has been in business for over 15 years and had about 125 employees two years ago.

The following list shows the number of Jenzabar employees in various categories:

- ❑ Administration 20
- ❑ Sales/Marketing 18
- ❑ Client Services 79
- ❑ Product Development 103

On average Jenzabar employees have at least 5 years of experience working for the company and at least 10 years working for a college or university in some capacity. Some of those past positions include:

- ❑ Development Services Assistant
- ❑ Operations Manager for IT
- ❑ Director of Graduate Studies
- ❑ Coordinator of Academic Advisement
- ❑ Director of Alumni Affairs
- ❑ Director of Advancement
- ❑ Director of Development
- ❑ English & French Instructor
- ❑ Campus Planner and Product Manager

Has the vendor been declared in default of any contract?
No

Has the vendor forfeited any payment of a performance bond issued by a surety company on any contract?
No

Has an uncompleted contract been assigned by the vendor's surety company on any payment or performance bond issued to the vendor arising from it's failure to fully discharge all contractual obligations thereunder?
No

Within the past three (3) years, has the vendor filed for reorganization, protection from creditors, or dissolution under the bankruptcy statutes?
No

Is the vendor now the subject of any litigation in which an adverse decision might result in a material change in the firm's financial position or future viability?
No

Company History

Tiennamen Square activist Ling Chai founded Jenzabar in 1998 in Cambridge, MA. While at Harvard Business School in 1997, Ling realized the void in online distance learning and created Jenzabar, the phonic translation of which is, "the best and the brightest." Starting with only four people working from her basement, the company has grown to more than 200 employees with six branch offices nationwide.

Jenzabar's Internet Campus Solution includes course management tools that encourage faculty members to develop and publish course materials online. The system also allows professors to communicate more efficiently and promote interactive discussions among students.

The original product consisted of a web-based Instructional Management Solution and a Portal. Jenzabar's flagship clients include Boston College Carroll School of Management and University of Massachusetts Boston who remain loyal customers. Their continued use of our product exemplifies Jenzabar's commitment to providing a quality product and complete customer appreciation. The web-based product allows for the posting of handouts, interactive syllabi, online testing, a web-page builder, campus-wide bulletin boards, real-time chat, and much more.

Jenzabar also provides integration of student information, financials, advancement, and human resources with the Internet infrastructure, and the easiest means to support online communities both within the campus and as an extension of the physical campus.

In the Spring of 2000 Jenzabar merged with CARS, CMDS, Quodata, and Campus America and is now the world's largest provider of integrated administrative software,

Internet infrastructure, and services devoted exclusively to higher education. The four companies, Quodata, CMDS, CARS Information Systems, and Campus America, provide over 70 years of collective experience in the industry. Software products and services from the newly combined company are already in use by some 1,000 colleges, universities, and other institutions of higher learning around the world.

Jenzabar's customer base has grown rapidly. Schools proactively seek our administrative software solutions, which are seamlessly integrated with our web-based portal. The Jenzabar front-end Internet solution will provide a single login with our enterprise software system and will receive all significant data in a school's database. Anyone who demos our product will agree with the current market research that we are by far the easiest software solution to use and have superior customer support.

Vendor References

Institution Name	Contact Information	Size of the Institution
Berry College 2277 Martha Berry Highway, NE Mount Berry, GA 30149-0001	Mr. Tim Farnham 706-236-1725 tfarnham@berry.edu	2,089
Central Florida Community College PO Box 1388 Ocala, FL 34474-4478	Ms. Kathy Anderson 352-854-2322	5,570
Florida Southern College 111 Lake Hollingsworth Drive Lakeland, FL 33801-5698	Mr. John Thomas 863-680-4111	2,559
Seton Hill University Greensburg, PA 15601-1599	Mr. Rich Cerullo 724-834-2200	830
Ranken Tech College 4431 Finney Avenue St. Louis, 63113-2898	Mr. Derek Babcock 314-371-0236	1,446

C. Proposed Services

Hardware requirements for LCMS server(s)
Please see Appendix for sample hardware requirements

Operating system requirements for LCMS server(s)

The portal framework utilizes uses Microsoft Windows NT Server. Component services include: Component Object

Model (COM), Microsoft Transaction Server (MTS) and Microsoft Internet Information Server (IIS) in a Windows 2000 environment.   Included in the portal framework is the portal administration model, which allows the institution to administer its portal presence, support their branding, and determine their content. Supported by a Microsoft SQL Server database, the framework supports personalization of content by both the institution and the end user.

Backend database requirements (if applicable) vendor & version (if database may run on a separate server or server cluster, identify server requirements.

ICP offers the most current developments in client-server technology by providing campus enterprise scalability along with true Windows operating system functionality. It can be deployed on the Windows 2000 Server while using the Microsoft SQL Server 2000 dedicated database server. In addition to the basic administrative functionality, we provide you with system-wide tools that are integrated and fully functional with the hardware. These features enable all users to expand the system's possibilities in their own ways. The infrastructure is completely linearly scaleable to extend to multiple sites.

The figure presents the conceptual functional framework for the Jenzabar Internet Campus. The entire software system is based on an open XML. It is completely extendable and scaleable. The Internet Campus framework will combine the following:

Provide performance test results specifying performance load testing – include hardware/software/database configuration of test system & testing methodology
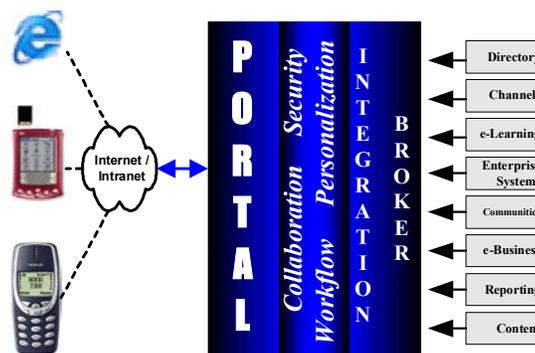
The Jenzabar Internet Campus Solution adheres to the following system performance guidelines:

A fully automated backup and restore solution to provide online non attended scheduled backup

SAN connected tape library with at least 50 media slots and 4 SDLT 110/220 GB tape drives

Suitably configured backup server (at least dual processor PIII and 1 GB RAM) to manage the backup operation

Enterprise level backup and restore management application with SAN based (LAN-free) backup capabilities

Scope of Services

ASYNCHRONOUS features

✓ Multimedia; streaming media supported, also embedded or linked graphics, audio, video, animation in a variety of formats. Limits of size and media player supported.

✓ Links to WWW resources external to course materials

✓ Links to other-format documents (word processing, CD's Excel, PowerPoint, etc.

✓ Import of other-format documents (word processing, CD's, Excel, PowerPoint, etc.

The JICS course authoring tools supports the upload of Excel, Word, PowerPoint, Notepad, MPEG, GIF, JPEG, and PDF formats.

Incorporation of scientific notation/mathematical formulae

✓ E-mail for feedback to instructor on each page

✓ Course e-mail (private messaging to individuals)

✓ Course e-mail accessible via standards-based e-mail

✓ Integrated asynchronous conferencing: threaded, multi-forum for separate subject conferences/groups, archived

✓ File exchange (easy upload of files to a common class space, easy download

SYNCHRONOUS features

Integrated synchronous conferencing (chat): multiple simultaneous users, archived, cross-course on same server (e.g., chat between students in different courses, as long as courses are housed on same server.)

✓

Jenzabar's Internet Campus solution blends both synchronous and asynchronous capabilities to form a powerful learning tool for administrators, faculty, and students. The Internet Campus is comprised of five major components: the portal framework, the constituent relationship modules for constituents of the institution, the groupware component, the business intelligence component, and the Instructional Management System (IMS) component.

The CRM modules (Constituent Relationship Management) modules provide the roles- based access for the user and support the customization and personalization of the user experience. Leveraging the wealth of information about the constituent, the CRM component provides information relative to what the constituent needs to know, actively pushing forth alerts and notifications relevant to the individual.

From the constituent's WEBase, the constituent will have access to personal productivity, collaboration and community resources, institutional enterprise applications (registration, student accounts, and so forth), and eCommerce (electronic payments), and enriched content (pushed content, alerts, notifications).

Through enriched, information-driven interactions, Constituent Relationship Management (CRM) is an essential ingredient of improving recruitment, retention, and alumni loyalty to the institution. In return, recruitment, retention, and alumni loyalty are essential to the long-term viability and financial well being of the institution.

Leveraging the Microsoft Office tools, the Internet Campus Release 1 will support integration with Microsoft Exchange Server as the groupware platform for providing eMail, scheduling, and tools for collaboration. Jenzabar is currently exploring supporting other groupware packages for future

releases of the product.

For anyone at any level within the Internet Campus environment, the Business Intelligence component of the Internet Campus framework provides a content-rich information-delivery experience. By both delivering data, and making data available for campus research, the, Internet Campus Portal (ICP) allows:

Dynamic Creation of Data Marts

Delivery of Standard Reports

Delivery of an Easy-to-Navigate

Custom-reporting Reporting Environment

Out-of-the-box Box Analysis Models to Look for Trends in Any Subject Area of Information

Visual Representation of the Data in a Variety of Navigable Graphics, including geographical mapping of the information.

With Business Intelligence as an integral part of the framework, Jenzabar not only allows the collection of the data expected by the user community, but it also allows a solution-oriented delivery of the information environment optimized for the Internet Campus user.

✓	Whiteboard, whiteboard drawing can be saved
✓	Shared browsing/Application sharing
✓	Internet-based audio conferencing, hand raising
✓	Internet-based video conferencing, hand raising
✓	Ability to import and display PowerPoint slide presentations
✓	Ability to hold "closed" chat sessions, where a session would be limited to two persons

STUDENT features

✓	Accessible for disabled students (voice reading of text, larger visuals, etc.)
	Bookmaking/return to last visited page within the course material
✓	Online assignments may be timed and automatically graded. Instructors have the ability to allow students to resubmit as necessary. By

allowing time-released material, "Coursework" allows for self paced education. Online/Offline quizzes and exams can also be administered through "Coursework," Offline assignments can also be posted in the "Coursework" area. When "Coursework" grades are finalized, they are inputted into the "Gradebook."

Course media center/centralized location for course media

✓ Password protected access, students can change their own password

✓ Jenzabar Internet Campus is password protected for user protection. Password transmission is SSL encrypted. Jenzabar servers and the database are also firewall protected with state-of-the-art security technology. The software is run and maintained by Jenzabar on centrally located Jenzabar operates a multi-layered defense strategy for all customer data elements and security infrastructure environments. Multi-layered high-availability firewall, router, and intrusion detection systems separate inner and outer layers of the site. All systems, servers, and devices are monitored 24x7x365 by the web operations and network security groups. API traffic is encrypted using a modified hash and checksum. Physical security is handled by Exodus

Communications and information regarding this can be found on their site. All systems are kept on a rigorous patching schedule and security is reviewed on a daily basis as dictated by our security policy.

Class list with e-mail links to all participants without visible showing e-mail addresses

✓ *The tool also supports the input of faculty pictures, email addresses, and contact information.*

✓ Student groups get individual working space/discussion space

✓ Students get individual project space/home page space

✓ Assessment/tutorials

✓ Multiple question types, including multiple choice, multiple answer, multiple choice, true/false, short answer and essay, with feedback regarding answers, with option (instructor-controlled) to e-

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mail answers to instructors.
There is a question bank available for instructors to use when creating quizzes and tests.

✓ Question weighting can be varied, also random question set from a pool
. Instructors can add weighted point values to different questions and are allowed to use the following question structures.

✓ Redirect path of tutorials depending on student answers
The assessment tool allows for the retake of exams.

✓ Time assessments, and limits on when they can be taken
Self-Assessment tools can be constructed in the form of surveys, quizzes, homework, or exams. Once created these can help users determine competency levels.

✓ Grading online and auto grading, if desired by instructor
Grades are automatically registered in the grade book when online testing is utilized.

✓ Grading can include text comments from instructor for student feedback

✓ Students have access to all course grades

✓ Students can see their grades relative to the rest of the class

✓ Grades can be sorted and grouped in a variety of ways (all quizzes total, participation, single exams, etc.)

✓ Assessment materials can be graded or ungraded

✓ Password-protected quizzes for proctor-supervised testing

✓ Progress tracking: students can access information about which materials they've completed

✓ Students can generate study guides for sections they want to review

✓ Students can take private notes online about course material

✓ Students can make public notes related to course materials, which become discussion notes

✓ Need only Web client and appropriate (free)

plugins to view all materials

Students can upload materials easily within the course

✓ Spell-checking for uploaded materials

✓ Online glossary of course-specific terms

✓ Search tool for course content

✓ Online student tutorial

Ability to provide help desk services for students twenty-four hours a day, seven days a week, three hundred sixty-five days a year via e-mail and/or telephone

✓

INSTRUCTOR Features

✓ Easy uploading/importing/integration of existing materials (e.g. word processing documents, PowerPoint materials)

✓ Need only Web client and appropriate (free) plugins to add to any materials

✓ Direct access to portions of the course without passwording, if instructor desires

Course planning online

The Jenzabar Course Management Toolset is an asynchronous learning environment for instructor-led education. The Jenzabar Course Management tools provide the framework for online delivery. The Jenzabar Course Management toolset includes sub-navigation areas for each distinctly offered course. This includes:

- ♦ *Course Descriptions*
- ♦ *Books*
- ♦ *Web handouts*
- ♦ *Web links*
- ♦ *Syllabus*
- ♦ *Coursework*
- ♦ *Grade book*
- ♦ *Chat*
- ♦ *Forums*

✓

- *Course Announcements*
- *Jenzamail*
- *Web Pages*
- *Coursemates*
- *Attendance Book*
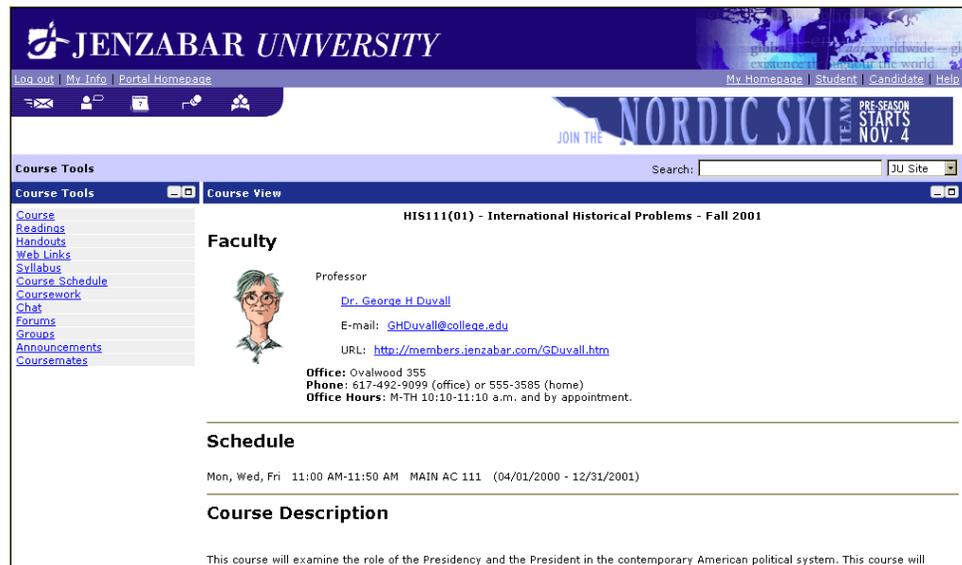
Course building templates exist as a development option

The entire process is wizard driven and follows a template that we provide with the system. Formatting functions are similar to what is provided in Microsoft Word or any other text editor. Knowledge of html is not required to build any component of the course.

Revising/updating course materials is easy (few steps) and not confusing

No HTML knowledge required to create/add course materials

The Jenzabar Portal course-authoring tool is an HTML-free course building utility integrated within the Jenzabar Portal Solution. The faculty member, however, is required to know how to use an Internet Browser and a word processing application like Notepad or Microsoft Word. After clicking the link to "Create a Course," the professor inputs course-identification details like name, code, and term. From this point, there is no distinction between the course delivery interface and the course-authoring interface. The faculty member

simply has "edit" links next to each area of the course delivery interface. This is advantageous because he or she can simultaneously make edits and note how the visual delivery of courses (content, layout, colors, backgrounds, font sizes, etc.) is affected.

Formatting and snippet advanced tools are also available allowing users to perform advanced editing without any knowledge of HTML. The tool also supports the input of faculty pictures, email addresses, and contact information.

If the professor is familiar with HTML, he or she may embed tags in the "edit" text areas to create advanced content layouts. All changes and edits are dynamically generated and instantly propagate student accounts. Students do not have any course-authoring edit functionalities. The course-authoring tool is additionally used to upload any kind of file format to the Handout and Coursework areas of the course delivery system. The course delivery system requires the user to have a reader to support these file formats.

JICS maintains a whiteboard with a similar HTML-free course-authoring tool. Faculty members can post notes, images, poll users, and save chat logs by simply understanding how to use a word processor. End users do NOT need to have any sort of reader to view these file types within the Jenzabar JICS. The professor has the ability to pass leadership to a TA or student, enabling that individual to upload materials to the class whiteboard session.

Grading online with written comments

Both real-time testing with automatic grading and upload/download testing are supported

Allows upload of grades from offline assignments (i.e., can function as an instructor's electronic gradebook, no matter where the grades come from)

Online help for creating materials class

Whole courses or parts of courses can be copied for inclusion in other courses

Platform supports testing state for courses to be debugged before making them live to students

Ability to easily import questions into a test bank

50

from a text file or common computer format (other than the proprietary format of the learning content management software).

The system allows answers to be stored on an application server to prevent cheating on tests. Questions and answers to a test can be randomized and instructors have the choice to use question bank that is also stored centrally on the application server.

Ability to have other testing software work within the learning content management software.

✓ Platform allows author to view course as student without logging out

✓ Ability to make a direct web link to a course page without going through the course catalog.

✓ Ability to provide help desk services for faculty twenty-four hours a day, seven days a week, three hundred sixty-five days a year via e-mail and/or telephone

✓

ADMINISTRATIVE Features

✓ Ability to authenticate users from multiple sources (including LDAP server)

✓ Multiple levels of secure access (i.e., administrator, instructor, grader, student)

✓ Single student account can access multiple classes

✓ Instructor can assign certain course materials to certain students/groups

✓ Tailor syllabus to student needs, start time, etc.

✓ Supports open enrollment as well as fixed start/stop courses

E-mail integrated with student tracking (so instructor could e-mail all those doing poorly by searching test scores then clicking a button to e-mail, for example)

✓

✓ Integrated data/grade analysis

Need only Web client and appropriate (free) plugins to administer course

✓

Details course and site usage tracking on per-student basis, progress tracking

✓

✓ Adding student records easy, batch adding possible

	May be configured to allow students to enter their own records
✓	Ability to add categories to student records in mid-course
✓	Students passwords changed easily
✓	
	Setting up student work groups with separate discussion/file space
✓	
	Backing up course possible/easy, restoring after crash easy
✓	
	Uses only standard Web server in addition to CMS software
✓	
	Exporting/importing materials from other CMS systems possible, including ALL materials
✓	
	Export course content in a non-proprietary format (such as text)
✓	IMS-compliant application
✓	Security management
✓	
	Platform is focused on internally developed courses as opposed to "canned" courses
✓	Monitoring servers / hosting off-site
✓	Remote access
✓	Crash recovery – timelines
✓	Student/instructor/technical support
✓	Student information system integration
	Platform uses open data standard so that it can communicate with existing college database applications
✓	
	Courses can be taken using a PC running Windows 9X, Windows ME, Windows 2000/XP and Macintosh running OS 7.5 or greater
✓	
	Platform supplies access to library resources other than the college's online library
✓	
	Platform supports multiple instructors for a single course
✓	Logout feature
✓	Guest account creation
✓	Offsite hosting contain sufficient bandwidth
✓	Password authentication design

✓	Ability to set expiration date for user accounts
✓	Ability to delete batch delete accounts based on access level (instructor, grader, student, etc.) and/or expiration date.
✓	Option to retain grade book records when accounts are deleted
✓	Ability to install a test system for course management or local system software upgrades without additional licenses fees.
✓	Student information system integration, including a shared user database with a single login (student information systems for which this is offered should be listed, and such integration should be included in the bid price).
✓	Ability to provide help desk services for software administrators twenty-four hours a day, seven days a week, three hundred sixty-five days a year via e-mail and/or telephone.

D. Infrastructure Support Services

Please see Appendix for a sample of infrastructure services that can be provided by Jenzabar.
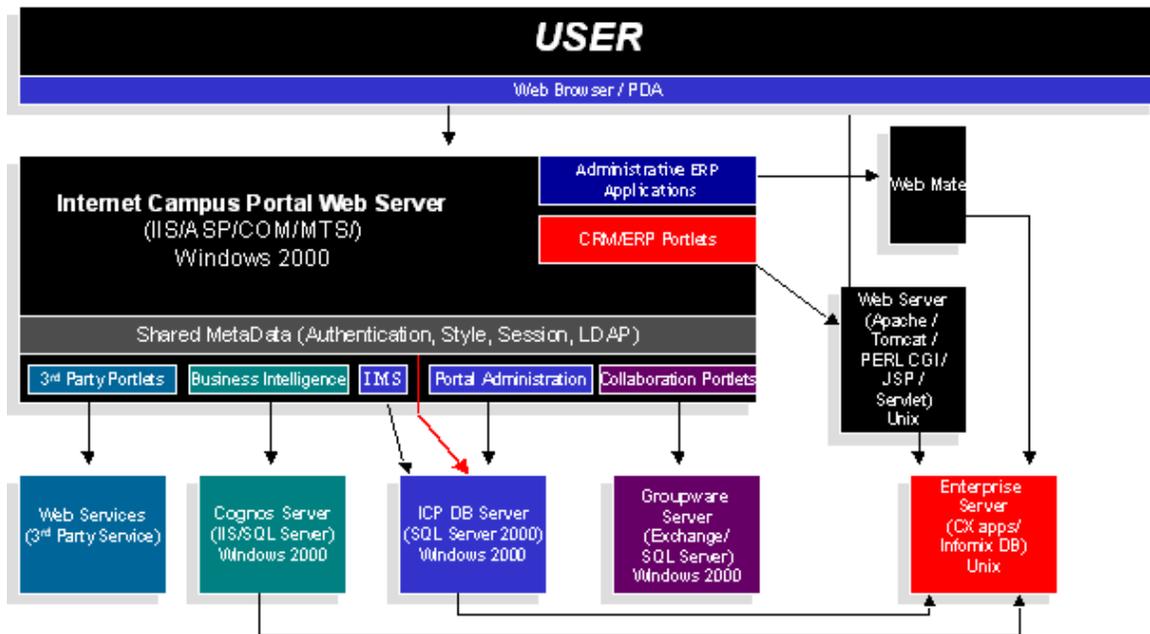
Concept of ICP with CX

Figure A represents architecture of the Internet Campus with the Jenzabar CX product or an ERP solution that any one of the MCCLMS system may have
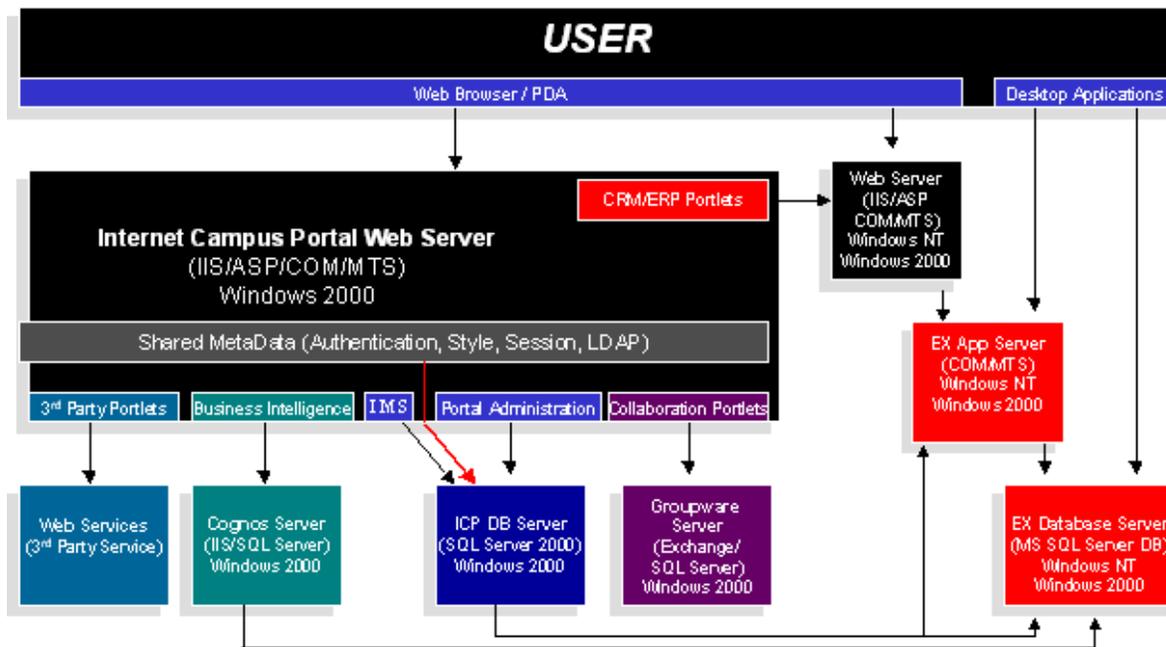
Concept of ICP with EX

Figure B represents the architecture of the Internet
Campus with the Jenzabar EX product or any ERP solution
that any one of the MCCLMS system may have.

E. Training

Implementation

Implementation of the Jenzabar Internet Campus solution includes a needs assessment, configuration setup, training, and installation of required software. The key element in a successful implementation is your Jenzabar account team:

- ❑ Account Executive: Account Management issues.
- ❑ Project Manager: Implementation issues.

The members of this team work directly with you to manage the on-going support of the Jenzabar solution. Their job is to focus Jenzabar resources to your maximum advantage.

Your account team is part of a larger support organization that includes Implementation Specialists and the Response Center. This balanced organizational structure combines local, regional, and corporate support. You benefit from the personalized attention of your account team, from the larger Jenzabar resources located at a centralized location, and from headquarters' resources such as product development and research personnel.

Working with Michigan Community College Association's management team and project personnel, your Jenzabar Project Manager develops a project plan that becomes the controlling document defining technical and managerial project functions. The project plan is updated throughout the life of the project as significant changes are made.

This plan may include the following components:

- ❑ Project charter/mission
- ❑ Project goals/objectives
- ❑ Deliverables
- ❑ Milestones
- ❑ Project schedule
- ❑ Communication protocols
- ❑ Assumptions/expectations
- ❑ Training plan

The size and complexity of each project determines which project management options will be employed.

Our goal is to provide you with a system and a partnership that will work for you, grow with your organization, and address your future needs.

Administrators & Faculty Training

Jenzabar provides onsite training for all faculty members and administrators wanting to learn about the Jenzabar Internet Campus and Learning Management System. Jenzabar has the ability to provide remote training if a client desires. Jenzabar also provides training for instructors and faculty to help them create curriculum content for online course development.

Jenzabar has consultants with experience in creating certification programs, and can share these skills as well. Regarding recruiting instructors to teach online, we already recruit instructors and thus have the necessary experience to assist.

Please see H for pricing guidelines regarding implementation & training.

F. Compliance

Americans with Disabilities Act

The Jenzabar Internet Campus Solution (JICS) displays all content in an ADA-compliance manner in accordance with current federal and state law and W3C Web content accessibility guidelines.

SCROM

When creating the Jenzabar Internet Campus Solution our Research & Development team took into consideration SCROM standards. While we have not participated in any "official" SCROM testing we have done our best to adhere to the standards put forth by SCROM.

G.   Contract

Sample Contract

Upon signing a non-disclosure act, Jenzabar will forward a sample software agreement contract to a Michigan Community Colleges representative.

H. Pricing

Jenzabar Investment Summary

Jenzabar Internet Campus Solution pricing includes API and the basic Learning Management System.

Michigan Community College	Investment based on FTE Tier
Alpena Community College	
Bay de Noc Community College	
Delta College	
Glen Oaks Community College	
Gogebic Community College	
Grand Rapids Community College	
Henry Ford Community College	
Jackson Community College	
Kalamazoo Valley Community College	
Kirtland Community College	
Lake Michigan Community College	
Lansing Community College	
Macomb Community College	
Mid Michigan Community College	
Monroe County Community College	
Montcalm Community College	
Mott Community College	
Muskegon Community College	
North Central Michigan Community College	
Northwestern Michigan College	
Oakland Community College	
Schoolcraft College	
Southwestern Michigan College	
Washtenaw Community College	
Wayne County Community College	
West Shore Community College	

Service Charges		
Item	Description	Total Investment

Help Desk	Annual Support Services fee is 18% of the initial upfront fee and annual license fee	
Upgrades	Included in Annual Support Services fee	
Termination Charges	180 day written notice	Must pay in full balance due through the termination notice period
Hosting Fee	18% of the initial up-front fee and annual license fee	

Additional Services

Any additional facilities needed to convert existing content for existing platforms such as Blackboard will be bill at a consulting rate of 200.00 per hour. Providing trainers to Michigan sites will also be billed at a 200.00 per hour, in addition to travel and lodging expenses will be billed.

We offer consulting services as needed for the integration of other unique technologies within the Jenzabar Solution. Much of this consulting takes place during system implementation, but we also offer technology evaluations beforehand and assist you in areas such as system planning and network configuration.

Consulting Charges		
Item	**Description**	**Total Investment**
Instructional Design	The base hourly consulting fee is $200/hour	$200/hour
Course Building Courses with Publisher or Other Content	The base hourly consulting fee is $200/hour	$200/hour
Faculty Development	The base hourly consulting fee is $200/hour	$200/hour
Online Faculty Certification Integration with Alta SIS system	The base hourly consulting fee is $200/hour	$200/hour

Standard Terms and Conditions

All Jenzabar prices, offers and conditions in this response will remain in effect for 90 days from the date of this proposal.

Jenzabar does not itself offer any lease/purchase option; however, such plans are available through our hardware partners. We will assist the customer by providing information and contacts for this type of financing.

Terms of sale and purchase of the software supplied by Jenzabar requires specific payments. The first payment of 50% for software is due upon contract signing. The second payment of 50% for software is due upon installation of the hardware, database and application system.

Upgrades and Termination

Jenzabar notifies all administrators via email upon any upgrade and/or significant modification to Jenzabar Internet Campus. There are no fees associated with upgrades to the system. All upgrades are included as part of the annual pricing structure.

Upon contract termination, Jenzabar and customer will mutually construct and execute project plan to export relevant portal and course management content. This service will be provided on a consulting basis. The project plan will estimate how many hours will be required for the task at hand and customer will receive a quote that will not be exceeded. Payment of 100% is required for hardware with the placement of the order.

Appendix C: Administrative Handbook

A Guide to Writing

Winning RFP Responses

May 22, 2002

Preface

Welcome to the Jenzabar family. Jenzabar was founded in 1998 in Cambridge, Ma. Jenzabar merged with CARS, CMDS, Quodata, and Campus America in June of 2000 and is now the world's largest provider of integrated administrative software, Internet infrastructure, and services devoted exclusively to higher education. Software products and services from the newly combined company are already in use by some 1,000 colleges, universities, and other institutions of higher learning around the world.

In the Corporate Communications Department, our talented technical communicators produce a variety of print and online documents that help the sales staff obtain new clients as well as retain old clients. In addition to handling the Request For Proposal (RFP) responses, they are responsible for the creation and maintenance of the corporate newsletter, web site, and product literature.

This handbook is designed to be a comprehensive, thoroughly practical reference guide for new marketing department employees as well as reference for employees already working in the marketing department. This Handbook offers coverage far beyond the scope of just answering questions for an RFP. It covers the process that Jenzabar uses to create an RFP response, stylistic guidelines, and *HotDocs*! procedures, and product information.

Table of Contents

1 What Are Request for Proposals (RFPs)?

In the world of proposals and solicitations there are two kinds of information products that a client may request, either a Request for Information (RFI) or a Request for Proposal (RFP). A RFI is just that, a request for information. The client is usually seeking to find out more about our organization and the types of products we produce; however, the client is not asking for pricing quotes or our business. Jenzabar defines a RFP as a document that outlines a problem and solicits proposals that explain how that problem can be solved.

A typically RFP has several parts that guide the way our response is written. Generally the RFP is comprised of an introduction detailing the reason for the RFP, their requirements for submitting and any special requests that will accompany the document. These special instructions may include the numeral order that must be used for assembling sections, it may detail a particular the use of a particular mail carrier (FedEx, UPS, and Airborne) for delivery, or it may detail the need for specific signatures from executives in the company. The introduction is also where you find the due date. It is important to read this section with a keen eye for detail.

Next, the RFP has a technical section or functional requirements section. This part usually includes yes and no questions, as well as essay questions. This is where any questions about the capabilities of our products are answered. The final part in the RFP normally includes a detailed pricing section. In this section vendors are asked to cover the software pricing, implementation and training fees, as well as any additional fees such as consulting or travel accommodations. Some clients include their own detailed pricing tables while others choose to

let the vendor reply with their own. No matter the format it is important that the fees are clearly stated and easy for the client to understand and that is your job as the Technical Communicator.

When writing RFP's for the higher education market, Technical Communicators must pay attention to several factors. It is important to consider the technical (database and servers), marketing (features and benefits), and business (terms, conditions, maintenance agreement) detail that each response requires. Some key concepts of RFP responses are:

- ♦ An in-depth understanding of what is being sold
- ♦ An understanding of what the customer's requirements are
- ♦ An awareness of the customer's needs
- ♦ A willingness to help the customer make the right decision
- ♦ A demonstrated knowledge of the marketplace

Who is involved in the RFP Process?

Requests for Proposals (RFP's) received in-house generally come to the attention of the Director of Corporate Communications or to the attention of one of the Technical Communicators. They are received either directly from a prospect or occasionally forwarded through a Regional Sales Manager.

Because the RFP response process is a team effort there are two additional key players in the process: the Regional Sales Manager and the Product Marketing Manager. Together with the director of corporate communications, the regional sales manager and the P Product Marketing manager help in completing the RFP response.

Regional Sales Manager - RFP Responsibilities

It is the job of the Regional Sales Manager to communicate with the assigned Technical Communicator decisions regarding Jenzabar's intentions to respond or decline a RFP. The regional sales manager must maintain role as primary contact with the prospect for questions related to the proposal. If the proposal is approved, you may communicate your decision to respond along with any special instructions. Typical activities may include:

- Identifying the pricing tier (1-10)
- Including optional modules
- Excluding select modules
- Determining product preferences (CX, EX, Jenzabar Internet Campus Solution)
- Determining hardware preferences (HP, IBM, Compaq, Dell)

Product Marketing Manager-RFP Responsibilities

The Product Marketing Manager assists the Technical Communicator with responses to the functions requirements specifically and other RFP answers as needed. He or she is also responsible for addressing RFP requirements that may suggest that Jenzabar might not be a good fit to address the prospects needs. Additional activities may include:

- Communicating any problems with meeting the timetable as soon as the request is received.
- Arranging for someone else to answer questions that you cannot answer.
- Reviewing boilerplate responses used by Sales Support.

2 Jenzabar Line of Products

To write a professional and complete RFP response, you need through knowledge of the Jenzabar product line. Currently Jenzabar has two administrative software solutions, Jenzabar CX and EX, and a higher education portal, the Jenzabar Internet Campus as well as a distance learning solution the Jenzabar Virtual Classroom. These products provide integration of student information, financials, advancement, and human resources with an Internet infrastructure, and the easiest means to support online communities both within the campus and as an extension of the physical campus.

Jenzabar CX

Jenzabar CX is formerly known as the CARS administrative software solution. CARS was founded in 1984 in Cincinnati, Ohio to provide administrative software solutions solely for higher education. Jenzabar CX provides all the advantages of high-end processing – advanced functionality, tools, support for typically larger institutions that handle higher transaction volumes, and significantly more robust customization features.

The CX Solution includes integrated software solutions and computer systems built upon performance-based technology, including a Java-based Web/graphical user interface in a client/server environment. Jenzabar CX is an enterprise administrative suite comprised of student, financial, human resources, institutional advancement, information management, and support services for rapid implementation. Jenzabar CX is:

- Web-enabled
- Fully scalable
- Adaptable

- Unprecedented in the navigation and communication tools it offers for every constituency you serve, and

- Fully capable of handling all your administrative and student information needs, including e-learning, course management, and e-commerce.

- Functionally rich.

Quick facts about the Jenzabar CX Solution

Operating System

Jenzabar CX uses the powerful Unix Operating System for running applications.

Hardware

Client PC's must have the following minimum standards unless otherwise noted:

- Pentium-120Mhz or faster computer
- Windows 98, NT 4.0, or later
- 128 MB RAM
- 4 GB hard drive that provides at least 400 MB free space
- 56K baud modem or faster
- Access to an analog telephone line, when needed
- Networking software to provide access to the CARS Unix server
- Networking software to provide access to the Internet (optional but highly recommended)
- The ability to establish a PPP connection from Jenzabar Client Support Services to the client's network when calling by modem
- QVT/Net 4.15 software with emulation of VT100 terminal
- Microsoft Office 97 (including Outlook) or later

- Netscape Communicator, version 4.05 or later
- Internet Explorer, version 4.0 or later
- PcANYWHERE, version 8.0 or later
- [CARS QuickMate](#) GUI, version 1.3b or later

Networking

The system may consist solely of terminals connected to one central processor—the mini-computer. It is desirable to accessing the Jenzabar CX administrative software that these computers are used if your school has PCs or Macintosh computers on campus. A LAN accomplishes this best. Jenzabar CX requires either an Ethernet or Token Ring network using Transmission Control Protocol/Internet Protocol (TCP/IP) to pass data from one network node to another.

Database

Jenzabar CX includes the IBM Informix true relational database system that manages data storage and retrieval.

Jenzabar CX Module Descriptions:

This total solution for client's include:

- Data integration with easy sharing of information
- User-friendly software and information
- Secure access 24 hours a day
- Extended services and support

Student

This application manages and provides information for all aspects of a student's collegiate path from recruiting and admissions, including the financial aid process and on-campus activities through course registration to graduation.

Human Resources

From application through termination, this application supports the collection and management of vital HR information. The comprehensive payroll system gives your institution access to vital statistics, benefit management, position and compensation management.

Financial

This application tracks all financial information of the institution with a flexible general and subsidiary ledger financial system. Provides flexible and timely financial reporting to keep you on top of your financial situation.

Institutional Advancement

From managing the constituent, to organizing and successfully measuring campaigns, this application supports the full cycle of development work. Includes detailed, comprehensive graphical information for data analysis and trend reporting that is easy-to-use and "drill down" through for closer examination.

Course Management

To supplement courses, streamline the learning experience of students, and save time, Jenzabar offers powerful and easy-to-use course management tools that deliver the right content in context to enrollment.

Decision Support System

Jenzabar's CX includes powerful Cognos® reporting tools that generate detailed, comprehensive graphical information for data analysis and trend reporting. Jenzabar enterprise reporting includes pre-defined reports and data extraction, and analysis tools for comparative and trend tracking reporting.

Cognos Impromptu® and Impromptu Web Reports

For reporting requiring maximum functionality, Jenzabar features Impromptu, which gives you the ability to create your own queries and reports, produce colorful charts, and create effective graphs with your institutional data. With Impromptu Web Reports, your institution can manage report distribution from a centralized location.

Cognos PowerPlay® and PowerPlay Web

When you need to make decisions based on overall statistics and comparative data, Jenzabar features the Cognos analysis tool PowerPlay. Designed for use by upper-level managers and decision-makers, PowerPlay provides a multi-dimensional view of the information and has features designed to produce comparative reports, analyze trends, show data from a variety of perspectives, and highlight exceptions.

PowerPlay provides a multi-dimensional view of the information to assist you in analyzing trends and identifying exceptions. With PowerPlay Web, you have the added benefit of using a familiar Web interface to access your online analytical processing (OLAP) servers, for intranet and extranet multidimensional analysis, reporting, and report distribution.

Jenzabar EX

Jenzabar EX was formerly known as CMDS's Elite™; a client/server administrative software solution provides portability among clients (Windows and NT), multiple platforms, and databases (Microsoft SQL Server and Oracle). CMDS (Computer Management and Development Services, Inc.) was founded in 1980 to meet the administrative software needs of the higher educational community. This comprehensive system

utilizes a suite of modules for departments within a collegiate setting. Jenzabar EX is:

- Web-enabled
- Designed for institutions seeking an out-of-the-box, easy-to-use environment
- Unprecedented in the navigation and communication tools it offers for every constituency you serve, and
- Fully capable of handling all your administrative and student information needs, including e-learning, course management, and e-commerce.

Quick Facts about the Jenzabar EX Solution

Operating System

The Jenzabar EX Solution offers the most current developments in client-server technology by providing campus enterprise scalability along with true Windows operating system functionality. Jenzabar EX can be deployed on Microsoft Windows 95, Microsoft Windows 98, Microsoft Windows 2000 Professional, or Microsoft NT Workstation client computers. The dedicated database server can be configured for either of the following database engines: Microsoft SQL Server 7.0 or Oracle. In addition, several current Jenzabar customers have supplemented the client-server installation of TEAMS Elite with a thin-client environment using Citrix Metaframe Server and Windows Terminal Server.

Hardware

- Pentium III 500 MHz or greater
- Choice of Windows 98 / Windows NT Workstation
- Processor 64 MB or greater
- Disk space TEAMS Elite – 50MB plus an additional 15 MB per installed Jenzabar EX Module
- InfoMaker – approximately 20 MB
- PowerFAIDS – 20-40MB
- SQL Client Utilities – 25-40MB

- Video- 800X600 pixel SVGA resolution
- Software- Word processing packages compatible with TEAMS Elite mail merges (Microsoft Word 7 within Microsoft Office 95

Networking

Database

A customer's choice of server hardware is dependent upon the number of client workstations that are expected to access the database simultaneously, and the number of records (current and projected) in the school's database. For the purpose of this discussion, we make the following assumptions and recommendations:

- All new customers will choose to purchase a new server dedicated solely to the management of the Jenzabar EX database.

- Due to the significant advantage in price-to-performance and ease of implementation, the overwhelming majority of Jenzabar EX customers will choose an Intel-based server with Microsoft Windows NT Server as the operating system and Microsoft SQL Server as the database engine. *Other hardware recommendations based upon an Oracle/Unix solution are available upon special request.*

- Because Jenzabar EX is a mission critical application, customers will choose hardware manufacturers whose servers have been fully tested and certified as a complete system for Microsoft Windows NT Server 4.0 (Microsoft Hardware Compatibility List) and Microsoft SQL Server 6.5. *For performance, compatibility, and support, Jenzabar recommends Tier 1 hardware manufacturers Compaq, Dell, IBM, and Hewlett Packard.*

- The hardware and software recommendations below are the minimum general requirements for implementing Microsoft SQL Server and Jenzabar EX in a client-server environment.

Jenzabar EX Module Descriptions

Education Applications for Higher Education

A total solution for clients includes:

- Data integration with easy sharing of information
- User-friendly software and information
- Easy, secure access 24 hours a day
- Extended services and support

Student

This application manages and provides information for all aspects of a student's collegiate path from recruiting and admissions, including the financial aid process and on-campus activities through course registration to graduation.

Financial

This application tracks all of an institution's financial data with a flexible general and subsidiary ledger financial system. Provides flexible and timely financial reporting to keep clients on top of their financial situation.

Payroll/Personnel

From application through termination, this application supports the collection and management of vital HR information. The comprehensive payroll system gives your institution access to vital statistics, benefit management and compensation management.

Alumni/Development

From managing the constituent to organizing and successfully measuring campaigns, this application supports the full cycle of development work. Includes detailed, comprehensive graphical information for data analysis and trend reporting that is easy-to-use and "drill down" through for closer examination.

Executive Information System

Jenzabar EX includes the Sybase® reporting tool InfoMaker®. This powerful reporting tool has an easy-to-use interface that helps you generate informative, decision-ready reports. With InfoMaker, clients do not need to understand database languages, and they have access to templates for instant report layout, seamless connectivity to databases, and point-and-click query construction. For executive-level reporting, Jenzabar offers the QuikView reporting tools. QuikView is a set of services and data manipulation tools especially created and designed to assist institutions in their efforts increase institutional effectiveness and receive the "embedded" benefits of an integrated administrative management information system. QuikView tools enable clients to measure an institution's performance from many perspectives as well as track costs, make historical comparisons, and recognize trends.

Enterprise Information Portal

Designed specifically for higher education, Jenzabar's Enterprise Information Portal is an intelligent, Web-based application that recognizes the needs of an individual and generates dynamic Web pages accordingly. Jenzabar's Web-based Intranet can be applied to small schools, large universities, private colleges, and public systems. Students, faculty, administrators, and staff can use it from any computer with a connection to the Internet, allowing them access to information they need when they need it.

Course Management

To supplement courses, streamline the learning experience of students, and save time, Jenzabar offers powerful and easy-to-use course management tools that deliver the right content in context to enrollment.

3 Receiving an RFP

Normally all RFP's are given to the Director of Corporate
Communication and he then assigns the RFP to a writer in the
department. In certain instances Technical Communicators do receive
RFP's directly. If you receive a RFP from a potential client, complete the
following tasks.

1. Log the name of the school, the RFP due date, and other
   task information into the Outlook Exchange Server folder
   for RFP's (Public Folders/CINCINNATIOH/CIN-MKT/RFP).
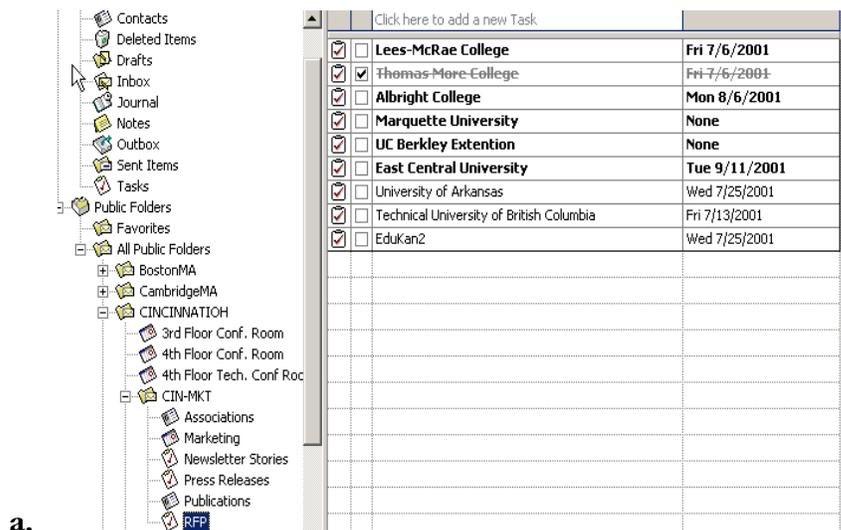
   a.

2. If the RFP arrives in electronic form, create a sub-
   directory on the 'mktsales' drive in the RFPs folder. Copy
   the electronic copy of the RFP into this directory.

3. Print and give the Director of Corporate Communications
   one copy for his review. The director will share this
   assessment with you and return the hardcopy document
   for use as a working copy.

4. The Director of Corporate Communications assigns the
   RFP response to one of the Technical Communicators.

5. When you are assigned an RFP, you are responsible for
   informing the appropriate Regional Sales Manager that an
   RFP has been received and communicating any "red
   flags" identified by the Director of Corporate
   Communications.

If you do not receive an electronic copy of the RFP you should ask the Regional Sales Manager to assist in obtaining one from the prospect. Having an electronic file is one of the keys to preparing a professional looking response. Backup options include, scanning with the use of character recognition software or answers tied to a numbered list corresponding to the same numbers associated with the questions. If any information is missing, you should ask the Regional Sales Manager to call the school. Communicating in a timely manner is essential to the success of all parties involved.

Red Flag Analysis

The Director of Corporate Communications reviews the RFP for possible "red flags." Red flags identify reasons why a particular opportunity might not be a good fit for Jenzabar. It also serves as a way to identity which product (Jenzabar CX, EX, or, Internet Campus) is the best match. Typical red flag items to look for include:

- Bid bond
- Performance bond
- Requirement for unsupported hardware platform(s)
- Requirement for unsupported database platform(s)
- Requirement for unsupported feature functionality
- Insufficient time to prepare a response
- SIS only – Student Information System only no financial component.
- School it too small

The Director of Corporate Communications mails an assessment of the RFP to the assigned Technical Communicator. The Technical Communicator adds a message indicating that the project has been assigned to them. He or she must also identify the red flags, determine which product to quote, and request a prompt decision on whether to respond. The Technical Communicator then sends the revised message

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to the appropriate Regional Sales Manager with copies to the appropriate Area Vice President and Vice President of Sales.

Generally, Corporate Communications cannot proceed with an RFP until informed by the Regional Sales Manager that Jenzabar will be responding. If a decision by the Regional Sales Manager is delayed, the Technical Communicator must bring the situation to the attention of the Director of Corporate Communications who can, if necessary, authorize work to proceed.

Accepting the Bid

If Jenzabar decides to respond to a RFP, review the RFP for the following:

- When the document is due?
- How many original (linen paper) copies need to be sent to the school?
- How many signed (bonded paper) copies need to be sent to the school?
- Is a floppy disk or CD-ROM to be submitted?
- What is the school's correct street address (P.O. Boxes are not usable with FedEx.)?
- What supplies, if any, must be either in inventory or ordered:
    - Binders
    - Numbered tabs for proposal sections
    - Alphabetic tabs for appendix
    - Product literature

File the copy of the RFP with the active files located in sales cabinets found in the office of the Associate Vice President of Marketing for reference.

Declining the Bid

If Jenzabar decides not to respond to the RFP the Technical Communicator sends a letter declining to bid to the school. The Technical Communicator typically prepares and sends this letter.

- Copy a sample letter to the prospect's sub-directory. Sample decline letters are located in mktsales\Administration\LETTERS\ samples.
- Customize the sample letter with information from the RFP.

After you send the letter, do the following:

- File a copy with the original RFP.
- Update the prospect's status in the Exchange RFP folder maintained in Microsoft Outlook.

4 Common Essentials in RFP Responses

Every proposal is unique in content, but some sections are standard to all proposals, so it is important to read the RFP thoroughly. Be sure to take notes and follow the rules. While certain steps are rudimentary to the RFP process others are not and they are usually explained in the RFP. All proposals have items that rarely change. They may have a different title, but the purpose is usually the same.

Here at Jenzabar we try our best to meet the customer's needs by carefully reviewing the customer's desires. It is your job to work with your staff to create documents that fuse our technology solutions with the clients' needs. This section briefly discusses the common essentials of writing a successful RFP:

- Time Management
- Executive Summary
- Functional Requirements
- Management Section
- Pricing
- Appendix

Time Management

Once you have been assigned to work on a RFP you need to manage your time wisely. It is important to know how much time you can allot for certain activities. The chart below details the percentages assigned to certain tasks in the RFP process.

Percentage	Work Completed
25%	Red flag memo has been sent.
50%	HotDocs! has been generated and the functional requirements have been distributed to subject matter experts.
75%	A complete working draft has been sent to sales to review and functional requirements have been returned.
100%	The RFP has been sent to Sales

One of the biggest challenges that you will face when working on a RFP is the time it takes to have a document adequately reviewed by the sales staff. Generally, its best if you can allow the sales staff an entire week of review time, but that is not always possible. Try to utilize the chart below for gauging available review time.

Amount of time remaining to work on RFP after 75% of the work has been completed.	Allotted Review Time
One (1) month from the due date	The sales staff receives one (1) week to review the draft and make changes.
Three (3) weeks from due date	The sales staff receives three (3) days to review the draft and make changes.
One (1) week from due date	The sales staff receives one (1) day to review the draft and make changes.

**This chart assumes that you are working on one RFP.

Executive Summary

The executive summary is essential to the proposal process because the primary audience is the high-level decision maker. The executive summary provides the evaluator with an overview of the solution to the problem. By rephrasing the customer's needs demonstrates that we understand what is being requested. The executive summary should include only pertinent information that will help the reader understand Jenzabar's approach quickly. It is important to focus on giving the reader the following key concepts:

- A discussion of the proposed approach for meeting the requirements
- An overview of the proposed solution
- A discussion of our organization and relevant experience
- A discussion of the costs required
- A summary discussion of anticipated problems and proposed solutions

A discussion of assumptions made by us

Executive Summary: Introduction

The first paragraph of the proposal should begin by selling the solution to the client. It is more important to sell the company rather than the product. A winning introduction states that the requirements are understood and can be met in addition to a real selling theme.

Technical Sections

The technical section serves as the cornerstone for all other parts of the proposal; it is the product that is being sold. The technical section should make no assumptions concerning the evaluator's knowledge and acceptance of our technology. Introduce the section by demonstrating that we understand the problem and how to deal with it. It is imperative that the executive summary detail the chosen approach to the solution. It must also exude confidence that Jenzabar has quality trainers and a quality plan for fixing the problem.

The technical section provides details of the chosen approach to the solution. Project management is becoming more important as systems and projects become more complex. It is important to convince and sell the executive on our ability to meet requirements. It is also important for the executive to feel confident that we can get the job done. Because the technical sections addresses several key issues it is important that key concepts are explained correctly. The RFP should cover:

- Any outside issues and RFP requirements
- A direct response to the requirements listed in the RFP
- Product descriptions that use short summarized product descriptions in the body of the text and include more details in the appendix

- Installation and implementation (include a complete project schedule, if possible)

- Project organization (Resumes for key project personnel should emphasize that our staff has the skills needed for the project.)

Assumptions, if any

Be mindful that if the RFP guidelines are not suitable, we make the necessary adjustments but still conform to the requirements. It is important to continue to repeat our selling themes, benefits, and product superiority in the technical section.

Management Section

The management section provides insight into what physical resources will be required and who is responsible for supplying those resources. The management section should define our plan and how it will be implemented. A complete project plan can be a strong indicator that we are well organized with the ability to execute on the plan. Successful management sections include the following:

- An effective introduction
- Project management approach
- Project organization and responsibilities
- Project schedules
- Acceptance testing and sign-off
- Maintenance program
- Education program
- Personnel resume
- Corporate reference accounts
- Corporate history

Pricing Section

The value and worth of the pricing section should not be underestimated. It is important to know the tier that your RFP falls into. In order to calculate the tier of a particular school you will need to know

the full-time equivalent (FTE) formula. You can locate the FTE by looking in the <u>Higher Education Directory</u>.

FTE Formula

All full-time students + all part-time students –40% = the FTE. The pricing section should be a physically separate volume and it should summarize:

- All software costs
- All hardware costs
- All maintenance costs
- All implementation costs
- All education costs
- All administration costs
- Total system price
- Payment terms
- Standard terms and conditions
- Five (5) year costs of ownership (if requested)

Appendix

The appendix is a separate section that contains supplemental information too detailed to include in the main body of the proposal. The appendix should be organized early to minimize confusion. Appendix entries are named by letter not number. Appendixes may contain:

- Product data sheets
- Training schedule
- Company brochures
- Third party literature
- Reprints of articles about the company or products
- Industry surveys
- Industry analyst's reports
- Sample contracts
- Sample training class outlines

- Sample documentation
- Sample reports

5 Preparing an RFP Response

The RFP process involves collecting boilerplate information about the company and the products. It also involves the use of software called HotDocs! ™. This section will briefly cover the following:

- Types of questions that are asked in a typical RFP
- Functional Requirements that are normally included in an RFP
- HotDocs! and what it can do for you
- Building a HotDocs! boilerplate

RFP Question Types

Most RFP's have two types of questions, yes/no and essay. If you find that you cannot answer a particular question, you may need to refer to Subject Matter Experts (SME's) within the company for answers. Among these experts are:

- Trainers
- Documentation people
- Trainers
- Sales people
- Developers

The following individuals are your best options. Consult with the Director of Corporate Communicators as necessary.

Topic	Jenzabar CX	Jenzabar Ex	Jenzabar Internet Campus Solution
Admissions	Dave Johnston	Lisa Perry	Barb Calhoun
Financial Aid	Melanie Strodtman	Sarah Pape	Barb Calhoun
Institutional	Melanie Strodtman	Phil Kreider	Barb Calhoun

Advancement			
Systems	Gus Ortiz	Mike Weaver	Barb Calhoun
Financials	Paul Huizenga	Mike Weaver	Barb Calhoun
Human Resources	Chris Pass	Tom Huffman	Barb Calhoun
Registrar	John Jacobs	Dave Anderson	Barb Calhoun
Hardware	Adrian Stukey	Mike Stoltzfus	Mike Stoltzfus
Contract Information	Nancy Gerke	Nancy Gerke	Nancy Gerke

Note: Essay questions, which are not always present, may require original writing, or the use of the boilerplate text.

Boilerplate Files

Prewritten text and graphic files enable quick responses, efficient use of time, more time for customer. Boilerplate files also allows headquarters some margin of control over information that is being created. It also helps to stop "reinventing the wheel" when creating a new RFP response. Boilerplate files enable the user to respond more efficiently to an RFP, in addition to producing a better document. A common question or concern is how much or how little should be written. Marketing literature is a good source of boilerplate material but it must be used with caution.

Building the Boilerplate using HotDocs!

The process used to prepare a RFP response involves the use of HotDocs!. HotDocs! involves collecting boilerplate information about the company and the product. This means that the boilerplate RFP response is a Microsoft template rather that a Word document. HotDocs! creates the boilerplate information by asking the user a series of questions to ascertain the correct information to use in the response.

1. Open Microsoft Word.

2. Click on the **<HotDocs!>** icon

3. Choose **<CARS Response>**

4. **Click <Assemble>**

5. At the dialog box **<Assembly Options>**

    a. **The Answer File Dialog box will open.**

6. Click **<New>**

    a. **Keep the default settings.**

    b. **Now HotDocs! will ask you a series of questions. Each dialog box will have a specific name. Be sure to match the correct answer with the correct dialog box.**

7. Dialog box **Prospect**

    a. **<Fill in the answers to the questions in the field>**

8. Dialog box **Territory**

    a. **<Click the appropriate radio buttons>**

9. Dialog box **Pricing**

    a. **<Click the appropriate radio buttons>**

10. Question 1

    a. **<Yes>**

11. Question 2

    a. **<No>**

12. Question 3

    a. **<90 days, unless specifically told otherwise>**

13. Question 4

    a. **<No>**

14. Dialog box **Pricing Tier**

    a. **Enter the pricing tier. Pricing is based on FTE (full-time equivalency) enrollment. (FTE means that two half-time students are equivalent to one full-time student.) Pricing tiers are listed in a table and can be looked up easily.**

15. Dialog box **Products**
    Click the appropriate radio buttons. The following guidelines for selecting options are:

16. CollegeNet

17. IVR = almost always no

18. Nebraska Bookstore = sometimes yes, sometimes no

19. PlantMate = no

20. Universal Algorithms (room scheduling software)

21. Dialog box **Hardware**
Click the appropriate radio buttons. The following guidelines for selecting options are:

22. Mac = sometimes yes, sometimes no

23. HP = always yes

24. IBM = no (for now)

25. Dialog box **Implementation**
Click the appropriate radio button. We offer two packages with two levels of service. Ask the regional sales manager for the preference. If we don't know, click yes for both and find out later. Levels of service are as follows:

26. Standard—We work with the school to help them implement.

27. Premium—We do everything. This is good for schools with small technical staffs or large budgets.

28. **HotDocs! will now assemble your document based on the answers you provided. You will save the HotDocs! answer file to the default destination.**

29. Click **<Save As>**
Type in the following information:

30. Name of school

31. File name

32. Save the answer file as a Word file

33. Name it "Jenzabar response."

34. Create a new folder for the school.

35. Save the Word file to "**Mktsales on Carsfs1**" (a volume under "My Computer") in the folder "**Rfps.**"

6 Post-Proposal Activities

Most RFP's contain simple item-by-item instructions as to the format and content of our response. General submission criteria include:

- Response due date and time
- Number of copies
- Address
- Packaging
- Markings
- Cost proposal
- Signature