



April 26, 2024

**CORRECTION TO THE CENTRAL CUSTOMER RELATIONSHIP REQUEST FOR PROPOSAL
and
MUSL RESPONSES TO QUESTIONS RECEIVED
for the
CENTRAL CUSTOMER RELATIONSHIP MANAGEMENT REQUEST FOR PROPOSAL**

CORRECTION TO THE REQUEST FOR PROPOSAL:

Under **Section A. REQUEST FOR PROPOSAL**, the fourth paragraph, in part, is deleted:

Additionally, the system must guarantee a single account per player. ~~and where possible an online payment function so that players may purchase tickets in all available sales channels for MUSL multijurisdictional games.~~

SUMMARY OF THE PROJECT

Multi-State Lottery Association

As described in the RFP, the Multi-State Lottery Association (MUSL) has 39 lottery members. We assist member lotteries and other lotteries in the operation and sale of Powerball and other multi-jurisdictional games.

MUSL is not a lottery, and it does not sell tickets. It does not manage retailers, and does not pay players for validated, winning tickets. The central MUSL CRM will not accommodate any sales, including online sales of any lottery products, nor will the successful vendor be responsible for any drawings related to second chance or other promotions.

Overall Goals of the Project

When authorized by the membership, MUSL facilitates various promotions that typically have an associated second-chance element. MUSL has facilitated one to two promotions per year; this number may increase or decrease.

The MUSL CRM project will be a centralized system that will act as a single repository for player entries into second chance or other types of promotions. The goal is to provide a central landing page (or other solution) that will allow players to enter their information so that they can enter contests and promotions offered by lotteries and facilitated by MUSL. No specific state lottery promotions will be a part of the MUSL CRM project; however, MUSL will prefer solutions that cross-reference players with lottery CRM systems.

For example, if a player from state X enters a promotion in the MUSL CRM system, MUSL wants that player information to be duplicated and sent to state X. Likewise, MUSL desires that the MUSL database includes players that have entered their data into state CRM systems. The goal is to have a single repository for ease of entries into a multi-jurisdictional promotion that is facilitated by MUSL, yet which can support information needed by lotteries for lottery CRMs that operate and players' and VIP clubs.

MUSL will prefer solutions that cross-reference players with lottery CRM systems so that players enter their data only once and not on multiple sites. The CRM is not a replacement for lotteries' CRM functions. The CRM is a supplemental system that will assist lotteries and players for ease of entry into multi-jurisdictional promotions facilitated by MUSL.

The central CRM will not support ticket sales by lotteries.

No back-office financial management services are requested. The CRM will not 1) manage, process, or track retailer lottery transactions, 2) calculate or share commissions to retailers, or 3) provide any accounting services to lotteries.

This is a new project (not a replacement system) for MUSL, and we will rely on the vendor to manage the system and provide player support. Specific technical information is not available at this time, and MUSL anticipates the successful vendor will assist in gathering information needed for the CRM.

Currently, we have no database of players for entry into second chance or other types of promotions. The term “integration”, as may be used in some questions and responses, means integration, or exchange of player account information between CRMs at lotteries and a MUSL CRM so that players enter their account information only once.

QUESTIONS AND MUSL REPOSESES¹

1. The RFP contains the following information: “...and where possible an online payment function so that players may purchase tickets in all available sales channels for MUSL multijurisdictional games.” Can you describe this requirement in more detail?

MUSL will not sell tickets, accept, or process payments. The information was a misstatement and has been corrected above.

2. Please provide clarification on the solution requested. Our understanding is that the request encompasses Player Account Management, Online Sales across the MUSL game library, and includes Second Chance Promotions. **No online sales are a part of this project as noted above.** MUSL requests a system that will provide players with a landing page or other function so that a player can enter a second chance or other promotion that is facilitated by MUSL.

3. Which system is responsible for managing the second chance draw?

MUSL will conduct the second chance drawings; no drawings will be conducted or managed by the CRM vendor.

4. What methods does the company currently utilize for conducting draws?

MUSL believes this question is irrelevant to the project.

5. Is MUSL seeking an inclusive i-lottery solution with i-lottery/PAM and CRM functionality?

MUSL is not seeking an i-lottery solution.

MUSL is seeking a central CRM that can incorporate lotteries’ PAM and CRM systems, both as they currently exist and as they are modified and expanded through the term of the contract.

6. Can you please provide a comprehensive list of systems for integration with the CRM, including the following details for each system: system name, version, and a concise description of the system’s purpose.

MUSL expects the successful vendor to assist in identifying each lottery’s existing customer relationship management systems and solutions for exchange of information between the MUSL CRM, and each lottery’s CRM so that players enter data only one time.

7. Provide the sum of entities or objects assigned for integration.

MUSL membership includes 39 lotteries. As noted above, each lotteries’ CRMs and PAMs are expected to be incorporated into the central CRM, along with lottery CGS and ICS necessary to validate the legitimacy of play entries on the Central CRM.

8. Include a high-level list of tables intended to link with the CRM and specify the integration direction (unidirectional from CRM to system X, unidirectional from system X to CRM, or bidirectional).

MUSL will rely on the successful vendor to assist in coordinating this information with member and other participating lotteries. We anticipate a bidirectional solution.

9. Identify the master data system for each table involved in each integration.

We expect the successful vendor to assist in identifying the information needed from the lotteries from their own CRM and related systems.

10. Specify the frequency of information exchange for each integration (e.g., real-time, or once/multiple times per day).

MUSL anticipates information exchanges monthly.

¹ Some questions were disregarded as not relevant to the project; others were combined to provide adequate responses.

11. Define the integration method if known (e.g. REST/SOAP/CSV protocol).

Vendors should provide integration methods in proposals.

12. If known, specify the authentication type for the integration.

Vendors should provide this information in proposals.

13. From a technical standpoint, will there be more than 10K records per operation during integration?

We expect more than 10,000 records per operation during integration

14. In terms of technical system integration support, does the company rely on an in-house technical team, external providers, or a combination of both?

MUSL relies on a combination of both. Most systems are maintained by a few external providers.

15. How many distinct data tables are required for migration to the CRM, and what is the current volume of each table saved for migration?

Initially, no migration will occur. It is unknown whether future migrations of data will be required, nor do we have a current volume of potential future migrations.

16. Can you provide the annual growth rate projects for the various tables over the next 10 years?

MUSL anticipates two or three national promotions per year. Participation levels are unknown at this time, but we anticipate over the ensuing years, millions of participants will register with the central CRM.

17. Regarding support tools, do you currently utilize an internal ticketing system?

Yes, but the ticketing system is not used for player support. A ticketing system for the CRM will be necessary.

18. Could you specify the preferred support channels (e.g. email, phone, WhatsApp)?

There isn't a preferred support channel; however, MUSL believes email and online chat seem best suited for this project.

19. Would you be willing to use our ticketing system for customer support?

Yes.

20. For ticket-related SLAs, what are the desired response and resolution times?

Vendors interested in this project should provide their SLA categories and responses times associated with the same.

21. Is remote maintenance support viable?

MUSL will consider remote maintenance support.

22. Does the requirement for sending notifications only apply to MUSL's web shop or to all customers' web shops as well?

The MUSL Central CRM project is not considered a "web shop" if use of the term means that visitors will be able to purchase lottery tickets from the CRM site. No tickets will be sold through the MUSL CRM. The Central CRM must be capable of sending notifications to registered players.

23. For wager limits and session times, does this imply limits for all customers independently of the respective system?

The central CRM will not support online sale of tickets. Responsible gaming principles implemented should reflect promotional guidelines, such as how many entries ("wagers") can be entered. No "session times" will need to be managed.

24. What precipitated the need for this solution? What are the business goals you would like to achieve with the CRM?

As stated in the RFP and the summary above, the goal of this project is to support lotteries, their players, and entries into multi-jurisdictional promotions that involve second chance entries and other multi-jurisdictional promotional opportunities by providing a central repository. Please review the RFP requirements.

25. What are the different user types and their goals?

MUSL wants to provide a website for players to enter second chance and other promotions. The goal is to supplement/support lottery CRM systems and ease of entry into second chance and other types of promotions.

26. “The central CRM will need to communicate with existing lottery gaming systems to verify lottery play data, lottery second chance drawing systems, and other information collected and maintained by lotteries.” Regarding this, is there a standard method by which player data can be imported to the CRM or will the proposed solution need to work with each state lottery independently?

There may be overlap in lottery systems, but the successful vendor should be prepared to thoroughly review and determine how best to integrate the systems necessary so that one CRM is available to players to submit an entry into the central CRM. Overall, lottery CRM systems and the central CRM should be able to exchange and identify overlaps in information. Ideally, players would not need to enter data twice – they would enter it into their state-lottery’s CRM system or the central CRM system. No information from lotteries’ ICS or CGS will be exchanged or provided to MUSL for this project.

27. Please provide more information regarding this portion of the requirements: “Proposals should also include how your product will address privacy issues related to customer data, and include the ability to opt out, preference selections, age-verification, and other matters as may be required by MUSL, and/or advised by the successful Vendor.” Commonly, identity and age verifications are handled by asking the user for their name, phone, age, and physical address and then ensuring no two players sign up with that same combination of personal information (or some combination like it). However, more formal circumstances might require a full identity verification with government-issued ID or through services like login.gov.

Identification verification with government-issued ID and/or services such as login.gov will not be necessary. Likely, the only information required from players using the central CRM will be name, contact information, ability to change account information, and the ability to opt-out of communications.

28. What are the desired types of marketing functions? For example, text, email, segmentation, loyalty programs, etc.?

We anticipate lotteries will be able to obtain information specific to their jurisdictions to integrate into their marketing functions. MUSL will not manage loyalty programs but may send emails to all players that enter data into the central CRM.

29. Will the system need to operate 24/7/52 with lottery and player support services managed timely by the successful vendor. Is player support required 24/7?

The system will need to operate 24/7/365, but player support can be managed during agreed upon hours.

30. Will each lottery require a custom integration to sync data or is there a unified method to integrate with individual lotteries (e.g., will the State Lotteries each provide an API for the purpose)?

MUSL anticipates that each lottery’s systems will require a customer integration to sync data.

31. Is the MUSL CRM intended to augment or replace existing member lottery CRM/loyalty systems?

No.

32. What functions are performed by MUSL employees vs individual lottery employees?

MUSL employees will review and provide non-technical maintenance to the system from its office. Lottery employees will not be expected to provide any support to a MUSL CRM.

33. For each system, specify whether there are pre-existing APIs or web services that have been developed and can be utilized to receive requests during the integration process.

There is some standardization in API communication within the industry, but it is unknown how many systems have adopted it.

34. What current processes exist to perform CRM functions? How would you want the new system to improve existing processes?

MUSL has no current CRM function.

35. Is MUSL requiring back office financial management to be covered under this RFP such as:

- Processing and tracking all retail lottery transactions from retailers.
No.
- Handling revenue sharing / commissions to retail sales agents who sell lottery tickets to consumers.
No.
- Financial subledger accounting for the lottery offerings including all payment details and tracking reconciliation with bank statements.
No.

36. How many estimated external contacts are in your database?

We anticipate that eventually, a central CRM will be available to millions of participants. Initially, we expect a lesser number of participants.

37. Estimated quantity of CRM licenses?

MUSL estimates two to three (2-3) licenses will be required. We will expect vendors to provide guidance on the number of licenses required so that MUSL can provide basic assistance and support to players who use the CRM. MUSL will not provide the technical support for the system.

38. Is this a unified system operating across multiple tenants for all states, or will each state have its own system providing CRM services independently?

Each lottery will have its own system of providing CRM services independently, which the central CRM will need to have continuing interaction with, but the central CRM will not control the individual lottery CRMs.

39. Could you please elaborate on the messaging channels presently accessible? What is the anticipated scale of your player database?

This is a new project for MUSL, and it is unknown how many players will register on a centralized CRM. However, it is anticipated that eventually, millions of participants will be registered on this CRM.

40. What geographical constraints will be implemented regarding player purchasing locations, and which areas will be excluded from purchasing?

The central CRM will be geographically restricted to participation by persons in the United States; the CRM will not be used to sell tickets (see above).

41. In instances where there are established sales channels for MUSL games within a specific state, will this system integrate seamlessly with those channels, or will it operate independently alongside them?

All sales channels will be established through existing lotteries, and the central CRM will integrate with lottery CRM and systems to validate promotional participation in the central CRM.

42. Could MUSL please offer guidance regarding the anticipated send volumes for outbound messaging channels, such as Email and SMS, throughout the duration of the contract, considering that pricing is often contingent upon send volumes?

It is anticipated that millions of participants will register with the CRM, but it is unknown what email and text communications volumes will be required.

43. The pricing structure for mobile messaging channels, including In-App Inbox and Push Notifications, frequently relies on the volume of active users. Could MUSL please furnish guidance regarding the anticipated Monthly Active Users for both the mobile app and website (distinctly, not aggregated) throughout the duration of the contract?

This is a new project for MUSL, and it is unknown how many players will register on a centralized CRM. However, it is anticipated that eventually, millions of participants will be registered on this CRM.

44. What is the anticipated frequency of second chance promotions to be initiated each year?

Currently, MUSL anticipates one to three second chance promotions each year.

45. Will the Second Chance drawings be conducted separately for each participating lottery, or will they be consolidated under MUSL?

Each promotion will have its own processes. We anticipate the drawings will be conducted by MUSL.

46. Would MUSL entertain the notion of establishing a unified national website encompassing all participating lotteries for second chance promotions?

Yes.

47. Is there a mandate to integrate with lotteries and their existing VIP or player retention initiatives?

MUSL is requesting proposals based on a central CRM that will integrate with lottery systems, including information from VIP and player retention.

48. Is there an expectation for a centralized player support system, or will support be facilitated through participating customers' loyalty or second chance programs?

Yes, the central CRM should include a player support function.

49. Is there an expectation to either create a standalone web and mobile application or integrate with the apps of participating lotteries for second chance promotions?

Integration is anticipated.

50. Is MUSL amenable to exploring various pricing frameworks? Could further clarification be furnished regarding the maximum annual cost not to be exceeded?

MUSL will review cost proposals submitted by vendors interested in the project and encourage vendors to include pricing frameworks that align with all solutions offered. We will not provide the budget, as costs will likely be included in the evaluation of the proposals.

2024 TIMELINE FOR THE RFP (MAY BE REVISED BY MUSL)

~~APRIL 26~~ — Answers to Vendor Questions (Anonymized, and posted to MUSL.com)

JULY 26 - Proposals Due by 3:00 pm CT (email only: Procurement@MUSL.com)

AUGUST 20-22 – Vendor interviews and demonstrations (at the discretion of MUSL)

SEPTEMBER-OCTOBER – Selection

SEPTEMBER-OCTOBER – Contract Negotiation

NOVEMBER – Project Kick-off Meeting