

# REQUEST FOR INFORMATION

## Lottery Gaming System and Supporting Products and Services for the Wisconsin Lottery

**RD241032**

**Issued Date: January 2, 2024**

**Responses Due: March 21, 2024, at 1:00 PM CT**



- This is not a bid or proposal.
- This Request for Information (RFI) is issued solely for information and planning purposes only and does not constitute a solicitation.
- Responses to the RFI shall not be returned.
- Responses to this RFI are not an offer and cannot be accepted by the State to form a binding contract.

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## 1.0 GENERAL INFORMATION

### 1.1 Definitions

For the purposes of this Request for Information (RFI), words and terms shall be given their ordinary and usual meanings. Where capitalized in this RFI, the following words and terms shall have the meanings indicated. The meanings shall be applicable to the singular, plural, masculine, feminine and neuter.

**"BI"** Business Intelligence

**"CAPS"** Consolidated Agency Purchasing Services

**"CGS"** Central Gaming System

**"CRM"** Customer Relationship Management

**"Business Day"** Each Calendar Day except Saturday, Sunday, and official State of Wisconsin holidays (see also: Calendar Day)

**"Calendar Day"** A period of twenty-four hours starting at midnight.

**"DOA"** Department of Administration

**"DOR"** Department of Revenue

**"EFT"** Electronic Funds Transfer

**"in-lane"** Product(s) or service(s) that allow Lottery products to be sold through the retailer point of sale systems.

**"Lottery"** The Lottery Division of the Wisconsin Department of Revenue

**"Lottery Gaming System"** complete integrated set of hardware and software elements that communicates, records, reports, captures and accounts for gaming data, including, but not limited to, issuing, canceling, and validating wagers, determining winners, and other functions necessary for the technological operation of the lottery.

**"Mandatory"** a requirement labeled as such must be present in the proposed solution, exactly as stated, or the solution will not be considered by the State of Wisconsin. The terms "must," "shall," and "will" are considered mandatory.

**"May"** indicates something that is not mandatory but permissible.

**"MUSL"** Multi-State Lottery Association

**"OEM"** Original Equipment Manufacturer

**"PAM"** Player Account Management

**"POS"** Point of Sale

**"Procurement Specialist"** the person responsible for managing this procurement process.

**"QA"** Quality Assurance

**"RFI"** Request for Information

**"RFP"** Request for Proposal

**"SaaS"** Software-as-a-Service

**"SLA"** Service Level Agreement

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"State" State of Wisconsin

"UAT" User Acceptance Testing

"Wisconsin eSupplier Portal" State of Wisconsin's electronic purchasing information system

## 1.2 Purpose of the Request for Information

The State of Wisconsin, Department of Administration (DOA), Consolidated Agency Purchasing Services (CAPS) on behalf of the Department of Revenue (DOR), Lottery Division is seeking to gather information to complete a request for proposal to acquire various lottery products and services from a qualified vendor.

This RFI is issued solely for information and planning purposes and does not constitute a solicitation nor offer to contract.

No more than four (4) responses deemed by the State to best fit the State's needs may be invited to demonstrate their solution before a team of State subject matter experts after the State completes its review of responses. Additionally, such solutions may be invited to participate in a proof of concept following a successful demonstration.

The Wisconsin DOR, Division of Lottery is seeking information from vendors to identify innovative and profitable approaches to the development, implementation, and integration of a full-service set of business and technology solutions, lottery gaming system and related services. This RFI encompasses multiple categories, and vendors must respond to all categories discussed in this RFI, **however, responses must be limited to 200 pages total**. The DOR, Division of Lottery requests vendors provide an executive summary for each section in their main response document.

### OBJECTIVES

The DOR, Division of Lottery has the following objectives for issuing this RFI:

- To aid in the preparation of a possible request for proposal for a full-service set of business and technology solutions Lottery gaming system and related services and to ensure a competitive process among prospective vendors.
- To obtain information on where vendors see emerging Lottery technology and services and insight into how the vendors are embracing innovative solutions.
- To learn about ways in which a lottery business and technology solutions gaming system may be open and flexible to meeting evolving needs and requirements of the DOR, Division of Lottery, its players, retailers, and employees.
- To obtain information to enhance existing retailer partnership and generate new partnerships with the Lottery to ensure mutual growth.
- To understand industry best practices in the area of business intelligence and data governance, and what vendor products and services are available in this space.

## 1.3 Background

The first Wisconsin Lottery games went on sale September 14, 1988 with one (1) scratch ticket and one (1)

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pull tab. The Lottery currently offers a variety of Instant and Lotto games including the newest introduction of Fast Play. The Lottery also participates in both Mega Millions and Powerball. Currently, the State Constitution prohibits us from participating in online sales and certain games like Keno.

Wisconsin Lottery sales benefit property tax relief for homeowners in Wisconsin. The proceeds of the Lottery Property Tax Credit are used to credit eligible property taxpayers for a portion of their yearly property taxes. Since 1988, the Wisconsin Lottery has generated more than \$18 billion in total revenue. Over 93% of that revenue has gone back to winners, retailers, and Wisconsin homeowners. Our latest annual total sales are estimated to be \$950+ million.

Currently there are about 3,800 retail outlets throughout the State, including convenience stores, grocery stores, service stations, restaurants, liquor stores, and nonprofit organizations. Tickets are sold by retailers that contract with the Wisconsin Lottery. Retailers can only sell lottery tickets for cash and at the price established by the Wisconsin Lottery. Retailers receive a basic commission of 6.25% for instant scratch tickets and pull-tab tickets sold, and 5.5% for all other lotto products sold. In addition, nonprofit organizations may apply to sell pull-tab tickets and receive a higher commission rate.

Games the Lottery offers, winning numbers, latest instant scratch tickets, game odds, and how to learn and connect with the Wisconsin Lottery can be found on the Wisconsin Lottery's website at [www.wilottery.com](http://www.wilottery.com). The Wisconsin Lottery is dedicated to responsible gaming and is level 2 certified through the World Lottery Association.

The last Request for Proposal (RFP) conducted by the State for the Lottery Gaming System, Instant Scratch Tickets, Warehousing, Distribution and Telemarketing Services for the Wisconsin Lottery was in 2014 and the documents are located at <https://vendornet.wi.gov/Bid.aspx?Id=176e7c8e-4a33-e611-a1d4-40a8f0ad9999&name=19958>. When that solicitation was awarded, the contract included a customized multi-channel gaming system, terminals, full-service vending machines, jackpot signs, digital Point of Sale (POS) displays, marketing and research support, warehouse facilities, and sub-lease staffing. The approximate annual cost of the contract is \$24,000,000 per year.

DOR, Lottery Division is interested in the following six (6) categories of products and services :

- Category 1: Lottery Central Gaming System (CGS)
- Category 2: Instant Ticketing Warehouse and Distribution
- Category 3: Internal Business Operations Support
- Category 4: Business Intelligence (BI) Applications and Data Management Solutions
- Category 5: Point of Sale Devices, Monitors, Signage and Related Services
- Category 6: Mobile App, Player Account Management (PAM), Player CRM Solutions, Player's Club Loyalty, Rewards Platform

## 1.4 Issuing Agency

This RFI is issued by the Consolidated Agency Purchasing Services (CAPS) on behalf of the DOR, Lottery Division, which is the sole point of contact for the State during the selection process. The person responsible for managing the RFI process is Amber Rademacher, Procurement Specialist.

## 1.5 State of Wisconsin Point of Contact

All contact with State of Wisconsin personnel regarding this RFI shall be made through Amber

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Rademacher, Procurement Specialist, Amber.Rademacher@wisconsin.gov or 608-264-9593. **No phone calls, emails, or other correspondence to other State staff regarding this RFI are permitted during the procurement process. All oral communications are unofficial and non-binding on the State. Vendors shall rely only on written statements issued by the Procurement Specialist.**

## 2.0 PREPARING AND SUBMITTING A RESPONSE

This section explains how the response should be constructed.

### 2.1 Reasonable Accommodations

Upon request, the State shall provide reasonable accommodations, including the provision of informational material in an alternative format, for individuals with a disability. If accommodations are needed, please contact Amber Rademacher at Amber.Rademacher@wisconsin.gov or 608-264-9593.

### 2.2 News and Social Media Releases

Vendors shall not issue news or social media releases or make any statements to the news or on social media pertaining to the subject of this RFI without the prior written approval of DOA or DOR, Lottery Division.

### 2.3 Calendar of Events

Listed below are important dates and times by which actions related to this RFI shall be completed. In the event that the State finds it necessary to change any of these dates and times, it shall do so by issuing an amendment to this RFI.

DATE	EVENT
January 2, 2024	RFI Issued
January 17, 2024, 1:00 PM CT	Questions Due (Round 1)
January 31, 2024 (estimated)	Responses to Questions Posted
February 14, 2024, 1:00 PM CT	Questions Due (Round 2)
February 28, 2024 (estimated)	Responses to Questions Posted
March 21, 2024, 1:00 PM CT	Response due date and time
Between April 22 and May 1, 2024	Tentative Dates for Presentations

### 2.4 Vendor Questions

Vendors are expected to raise any questions or clarifications concerning the RFI document by January 17, 2024 and February 14, 2024, by 1:00 PM CT both days. If at any time prior to the RFI due date, a vendor discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFI, the vendor shall immediately notify the Procurement Specialist representative named below of the issue in writing.

**The Wisconsin eSupplier Portal is the preferred method for submitting questions and/or clarifications.**

Email is also accepted for the submission of questions and/or clarifications and must refer to RFI RD241032 and be directed to Amber Rademacher at Amber.Rademacher@wisconsin.gov.

Note any vendor questions received outside of the Wisconsin eSupplier Portal shall be documented and

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consolidated with questions received from within the Wisconsin eSupplier Portal. All questions and answers will be posted as an Amendment on the Wisconsin eSupplier Portal. It is the vendor's responsibility to check the Wisconsin eSupplier Portal for any questions and answers pertaining to this RFI. In the event that it becomes necessary to provide additional clarifying data or information, or to revise any part of this RFI, amendments or addendums shall be posted on the Wisconsin eSupplier Portal.

All contact or communication with any employee or officer of the State of Wisconsin concerning this RFI, except Amber Rademacher, is strictly prohibited. Amber Rademacher may authorize in writing contact or communication with another state employee or officer as circumstances may dictate. Vendors who hold a current contract with Lottery may continue to communicate with Lottery's Contract Administrator regarding the performance of that current contract only.

## 2.5 No Obligation to Contract

The receipt of a response to this RFI from a vendor does not imply any contractual obligation on the part of State nor does it create any further obligation on the part of the State.

## 2.6 Retention of Rights

All vendor responses become the property of the State upon receipt. All rights, title and interest in all materials and ideas prepared by the vendor for the RFI to the State shall be the exclusive property of the State and may be used at its option.

Only information that can be identified as a trade secret, proprietary and confidential as defined in Wisconsin Statute 19.36(5) or is otherwise material that can be kept confidential under the Wisconsin Open Records Laws, and noted on the DOA-3832: Bidder Required Form will be treated as such. **Vendors shall not label or identify their entire response as confidential.**

## 2.7 Wisconsin eSupplier Portal Registration

Once vendors are registered on the State of Wisconsin's eSupplier Portal (the State's electronic purchasing information system) they will receive official notices throughout the procurement process for this RFI and any official notices of future procurement solicitation opportunities for the State of Wisconsin and University of Wisconsin System campuses.

To register on the Wisconsin eSupplier Portal access the following website for instructions:

[https://esupplier.wi.gov/psp/esupplier/SUPPLIER/ERP/h/?tab=WI\\_GUEST&wimsg=Logo](https://esupplier.wi.gov/psp/esupplier/SUPPLIER/ERP/h/?tab=WI_GUEST&wimsg=Logo)

Vendors may obtain additional State of Wisconsin purchasing information at <https://doa.wi.gov/Pages/DoingBusiness/BidsProposals.aspx>

Vendors without internet access may request to receive a hard copy.

## 2.8 Incurring Costs

The State shall not be responsible for any costs incurred by a vendor in the process of responding to this RFI.

## 2.9 Submitting a Response

Vendors shall respond to this RFI in either the Wisconsin eSupplier Portal or by providing a hard copy

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response (mailing address below). Faxed and emailed responses shall not be accepted.

**The submitted RFI response must not exceed 200 pages in total (single spaced, no smaller than 11 pt. font).**

## **2.9.1 Wisconsin eSupplier Portal Submittal (Preferred)**

Respond as directed herein and in the pages presented in the Wisconsin eSupplier Portal for this RFI. The State has developed questions that provide online guidance for an electronic response to the RFI. If responding electronically, do not submit a hard copy of any materials unless directed to do so elsewhere in the RFI document.

**Vendors must click "Submit" in the Wisconsin eSupplier Portal to have their RFI response received. Only clicking "Save" does not submit the RFI response; therefore, it shall not be received or reviewed.**

Certain requirements shall be presented as itemized questions that require an affirmative response from the vendor that indicate these can be met (i.e. "yes/no" prompt; drop down menu; required attachment). Other requirements may be presented in a grouped manner (e.g. "Does your company meet requirements 2.1-2.8"). For any (itemized or grouped) requirements that cannot be met, a "no" shall be checked and a supplemental document shall be provided as an attachment to explain.

Vendors submitting a response via the Wisconsin eSupplier Portal shall follow the instructions given in the eSupplier Portal system, including any Frequently Asked Questions.

Vendors shall allow time for entering a response in eSupplier. Keep in mind the following if an error occurs:

- File names must be no longer than 64 characters, including the file extension (e.g., ".docx").
- File names cannot contain any special characters (e.g., commas, percent signs, hash symbol).
- The maximum file size for any attachment is 80MB.
- The eSupplier system will not allow a file with macros included and enabled.
- Vendors may only upload a single file in response to a Bid Factor. Uploading additional files will overwrite the previous upload. If a vendor has the need to attach multiple files, the vendor shall consolidate the documents into a single file. Alternatively, the vendor may upload one (1) file in response to the Bid Factor and upload the rest of the documents using the Upload File button on the Submit Online Response page.
- In order to officially submit a response, the vendor must click the Submit button and receive verification that the vendor response has been submitted.

## **2.9.2 Hard Copy Response Submittal**

Vendors still have the option to mail or otherwise provide a hard copy response when responding to this RFI.

The State strongly encourages electronic submission (Section 2.9.1 Wisconsin eSupplier Portal Submittal) due to the potential decreased number of staff available to accept hand deliveries at State facilities or the potential for State building closures.

If submitting a hard copy response (instead of the electronic response option described above), Vendors shall submit an original signed response, marked as stated below of all materials required for acceptance of their response by the deadline to:



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Amber Rademacher, Procurement Specialist  
Wisconsin Department of Administration  
Consolidated Agency Purchasing Services  
101 East Wilson Street, 6th Floor  
Madison, WI 53703-3405

All responses shall be received and time-stamped at the above location no later than March 21, 2024, at 1:00 PM CT. Responses not time-stamped shall be considered late and rejected. Receipt of a response by the State mail system does not constitute receipt of a response by the DOA CAPS Purchasing Office.

All responses shall be sealed in a package, and clearly marked with the following information on the outside of the package:

VENDOR NAME  
VENDOR ADDRESS  
Lottery Gaming System  
RFI# RD241032  
March 21, 2024, at 1:00 PM CT

## 2.9.3 Hand Delivered Responses

All responses must be received and time-stamped at the above location no later March 21, 2024 at 1:00 PM CT. A Bid Box has been placed outside of 101 E. Wilson Street for the hard copy submittal of responses. This box is only opened at 1:00 PM CT on Tuesday, Wednesday, and Thursday.

The State is not responsible for deliveries that do not reach the Bureau of Procurement office by the required due date and time. Hard copy Bids will still be allowed in response to the RFI. However, the State has no liability for errors made in inputting any information into the eSupplier Portal submitted as hard copy Bid response.

## 2.10 Response Organization and Format

Vendors responding to this RFI outside of the Wisconsin eSupplier Portal must comply with the following format requirements.

Responses shall be organized and presented in the order and by the numbers assigned in the RFI with each heading and subheading separated by tabs or otherwise clearly marked and labeled.

A response shall be typed and submitted on 8.5 by 11-inch paper bound securely. The response cover page must include, at a minimum, the RFI name and number, and the vendor's name.

Only information that can be identified as a trade secret, proprietary and confidential on required form DOA-3832 will be treated as such. **Vendors shall not label or identify their entire response as confidential.**

**Tab 1 – Bidder Required Form:** Include the completed and signed Bidder Required Form (DOA-3832) and any other forms required in the RFI.

**Tab 2 – Vendor Information (Section 3):** Provide a point-by-point response as specified in this section.

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- Tab 3 – Contract Approach and Structure (Section 4):** Provide a point-by-point response as specified in this section.
- Tab 4 – Vendor Performance and Partnership (Section 5):** Provide a point-by-point response as specified in this section.
- Tab 5 – Category 1: Lottery Central Gaming System (Section 6):** Provide a point-by-point response as specified in this section.
- Tab 6 – Category 2: Instant Ticketing Warehouse and Distribution (Section 7):** Provide a point-by-point response as specified in this section.
- Tab 7 – Category 3: Internal Business Operations Support (Section 8):** Provide a point-by-point response as specified in this section.
- Tab 8 – Category 4: Business Intelligence Applications and Data Management Solutions (Section 9):** Provide a point-by-point response as specified in this section.
- Tab 9 – Category 5: Point of Sale Devices, Monitors, Signage and Related Services (Section 10):** Provide a point-by-point response as specified in this section.
- Tab 10 – Category 6: Mobile App, Player Account Management, CRM Solutions ; Player’s Club Loyalty, Rewards Platform (Section 11):** Provide a point-by-point response as specified in this section.

## 3.0 VENDOR INFORMATION

As mentioned previously, the intent of the RFI is to gain a better understanding of the solutions available to Wisconsin DOR, Lottery Division for the six (6) categories of products and services noted in Section 1.3. Briefly provide the following information for the respondent and its leadership team members.

- 3.1** Provide information about your company, principal business of respondent and, identify all product(s) and/or service(s) being presented and detail the respondent’s role, i.e., are you the owner/manufacturer/publisher (OEM) of the solution or a retailer/distributor responding on behalf of the OEM.
- 3.2** Provide information on your organization's industry awards, certifications, and your staff's technical certifications.
- 3.3** Identify any experience in implementing and maintaining a Central Gaming System for a state-sponsored Lottery program.
- 3.4** Describe how the Respondent is compliant with relevant Multi-State Lottery Association (MUSL) and/or State Government IT standards, rules, and regulations.
- 3.5** Explain where the State's data would be stored, duplicated, how it is stored (encrypted at rest, etc.), and how often data is backed up. Note, pursuant to s. 16.705(1r), Wis. Stats., services shall be performed within the United States. Countries party to the World Trade Agreement may not be subject to this requirement.
- 3.6** Provide information regarding your organization's technical assistance availability hours and geographic location. Include in your response a detailed description of your warranty services, maintenance services and support services, including severity levels, escalation procedures and applicable remedies if there is a failure to respond or restore within stated timelines.
- 3.7** Identify any experience in implementing and maintaining any business solutions for state

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agencies and/or government entities. Include in your response vendor references by completing the Bidder Required form #DOA-3832, listing at least three (3) different states with whom the vendor has provided the services as outlined in their RFI response within the last ten (10) years. For each state listed, the vendor shall include the State, address, contact person, email address and telephone number along with a brief description of the product or service that formed the basis of the business relationship.

The DOR, Division of Lottery shall determine which references to contact to assess the quality of the product or service. DOR, Division of Lottery may contact one (1) or more references that have been provided by the vendor or other sources that may not have been named by the vendor but can assist DOR, Division of Lottery in determining performance. DOR, Division of Lottery shall be the sole determinate as to whether the reference's response is equivalent to the requirements and qualifications in the RFI.

## 4.0 CONTRACT APPROACH AND STRUCTURE

The DOR, Division of Lottery, is interested in a bundled contract for the six (6) categories of products and services noted in Section 1.3. Briefly provide the following information for the Respondent's approach and structure.

- 4.1** Traditional lottery pricing structure is based on a percentage of ticket sales. What other pricing strategies could the Respondent provide for its solutions that may be more advantageous or efficient?
- 4.2** What are the Respondent's suggested approaches and specific recommendations for incorporating Service Level Agreements (SLAs) and/or Liquidated Damages into a contract?
- 4.3** What evaluation/scoring methods would the Respondent recommend be used when evaluating submitted proposals for a future solicitation?
- 4.4** What critical information would the Respondent like the DOR, Division of Lottery to consider including in a future solicitation?

## 5.0 VENDOR PERFORMANCE AND PARTNERSHIP

- 5.1** What is the Respondent's methodology, including processes and services, and timeline for system conversion/solution implementation and project management? How does the Respondent evaluate project management success?
- 5.2** Describe what type of training services your organization can provide. Include in your response if training has a limited timeframe after initial go-live and after an update, fixes, etc.
- 5.3** What staffing levels/support positions would the Respondent recommend they provide in order to facilitate the partnership and optimize the performance of the Respondent's solutions?
- 5.4** Provide examples that demonstrate the Respondent's approach to continuous improvement and improving process outcomes/results. If possible, provide examples of both internal programs for continuous improvement as well as processes implemented with external customers.

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- 5.5 Describe the Respondent’s approach to delivering system updates, custom enhancements, or new versions over the life of a contract, including both hardware and software upgrades. Include in your response how system updates are communicated, the cycle for updates and upgrades, the average downtime, and when the downtime usually occurs.
- 5.6 Describe the Respondent’s methodologies and processes for performing internal Quality Assurance (QA) and User Acceptance Testing (UAT). Provide a description of the various test systems and QA staff employed by the Respondent, as well as the ability to provide dedicated QA/UAT staff to the Lottery for testing support.
- 5.7 Provide your business continuity/disaster recovery plan as an attachment to your response which includes how quickly DOR, Lottery Division can expect to be restored to full functionality and how often backups occur.
- 5.8 Explain where the State's data would be stored, duplicated, how it is stored (encrypted at rest, etc.), and how often data is backed up. Note, pursuant to s. 16.705(1r), Wis. Stats., services shall be performed within the United States. Countries party to the World Trade Agreement may not be subject to this requirement.
- 5.9 What is the Respondent’s approach to integrating new third-party solutions, including the handling of development costs?
- 5.10 What performance metrics would the Respondent suggest be used to evaluate their provided services and performance and what cadence? (Example metrics: sales goals, system uptime, software quality, contract compliance, project delivery timelines.) How could performance incentives for achieving metric goals be integrated into the contract?
- 5.11 What ideas does the Respondent have to ensure a positive and productive working relationship with the DOR, Division of Lottery?
- 5.12 Provide case studies of previous Respondent’s implementations.
- 5.13 Are there any emerging technologies or services the Respondent is currently working on that you believe the DOR, Division of Lottery would be interested in, that were not addressed in this RFI? Include in your response planned enhancements to the solutions to be released within the next two (2) years, any planned enhancements to be released within the next five (5) years, and enhancements released within the last two (2) years.
- 5.14 Vendor’s Approach to and/or Recommendations for Cost-Saving Opportunities: The DOR, Lottery Division believes that its relationship with its Contractor should be a partnership. As such, the DOR, Lottery Division expects that Contractor will make a reasonable profit. However, the DOR, Lottery Division seeks arrangements that will help maximize returns for property tax relief for homeowners in Wisconsin. Provide information that may help the DOR, Lottery Division develop an RFP for a contract that would provide excellent value to the citizens of Wisconsin. **Vendor’s approach to and/or recommendations must not relate to subcontracting DOR/Lottery positions.**

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## 6.0 CATEGORY 1: LOTTERY CENTRAL GAMING SYSTEM (CGS)

DOR, Division of Lottery's Central Gaming System (CGS) provides a platform for transaction processing and related services for DOR, Division of Lottery's draw games (e.g., Powerball, Mega Millions, and State funded Draw Games), Fast Play games (print-on-demand instant-win games), pull-tab tickets, and Instant Scratch tickets. The CGS processes all Lottery gaming transactions, such as: wagers, ticket validations, inventory status updates, draw commands, and event logging. These transactions also interface in multiple ways to the State's accounting system (PeopleSoft). The DOR, Lottery Division's goal for the future RFP is to acquire a secure, state-of-the-industry Lottery CGS, including peripherals and other related gaming equipment that can adapt to changing markets and technologies to maximize profits by offering a wide array of products using multiple technologies and sales channels.

- 6.1** Describe the types of CGS transaction, operations, and services the Respondent's solution can provide and how it would support the full range of transaction processing needs as described above.
- 6.2** Describe how the Respondent has integrated with central accounting software, the types of transactions, was it summary or detailed transactions and how you managed updates? What did you find most challenging and what recommendations do you have for successful internal controls.
- 6.3** Describe how the Respondent's solution securely integrates and verifies transaction feeds from multiple vendors and sources, including third-party retailer POS devices.
- 6.4** Where does the Respondent see the industry going relating to innovative new CGS capabilities or products? Include in your response how your CGS is future proofed.
- 6.5** What is the Respondent's CGS system track record of reliability, up time, security, and history of successful upgrades?
- 6.6** What are the capabilities of the Respondent to provide limited time offers and ongoing coupons to players via the CGS?
- 6.7** What lottery products are supported by the Respondent's game marketing solution?
- 6.8** Describe how ongoing game sales liabilities, prize expense, retailer incentives and commissions, and marketing are tracked and reported.
- 6.9** List security roles, a brief description of each role, and how users are managed, reviewed, and authenticated within the solution.
- 6.10** What differentiates the Respondent's solutions from their competitors?

## 7.0 CATEGORY 2: INSTANT TICKETING WAREHOUSE AND DISTRIBUTION

This category covers all services and business functions relating to the storage and distribution of the Lottery's instant games (Instant Scratch and pull-tab tickets), including, but not limited to: new instant ticket game preparation and launch, warehouse storage, facility security, access control, fire suppression,

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climate control, disaster recovery locations, ticket ordering, ticket returns order packaging, distribution and delivery of retailer inventory, retailer support items and services, and end of game ticket destruction. **This excludes instant ticket printing.** The DOR, Lottery Division’s goal for the future RFP is to procure reliable, secure, and cost-effective delivery services that include next Business Day delivery service and return service for Lottery products and materials. The DOR, Lottery Division’s goal for the future RFP is to maintain a cost-effective warehouse facility with a high level of customer service, value, security, and integrity.

- 7.1 Describe the current instant ticket warehouse and distribution services the Respondent can provide to the Lottery and our retailers.
- 7.2 Describe new and/or emerging technology and services the Respondent foresees in the next ten (10) years to better serve retailer needs.
- 7.3 Describe the Respondent's process for ensuring accurate instant ticket inventory control and management throughout the life cycle of a game.
- 7.4 What, if any third-party vendors, does the Respondent use to ship and distribute instant tickets to retailers?
- 7.5 What are the unique features/capabilities of the Respondent's instant ticketing management system?
- 7.6 How does the inventory control and management features in the Respondents solution aid in customizing merchandising for lottery retailers at both vending and counter displays?
- 7.7 Describe the Respondent’s non-traditional solutions for selling, distributing, and servicing Lottery’s products to Wisconsin establishments such as, but not limited to, taverns and bowling alleys.
- 7.8 What differentiates the Respondent’s solutions from their competitors?

## 8.0 CATEGORY 3: INTERNAL BUSINESS OPERATIONS SUPPORT

This category encompasses the DOR, Division of Lottery’s internal business operations and back-office applications, which currently perform the following business functions:

- A. **Prize claims and payments** - this application provides claims form data entry, approval and processing workflow, annuity management, check writing, digital disbursement integration, prize accounting, and tax reporting.
- B. **Retailer billing and financial services** - this application provides retailer invoicing and adjustment processing, Electronic Funds Transfer (EFT) sweep process, financial reporting and reconciliation, general ledger accounting system integration and 1099 tax reporting.
- C. **Retailer Lifecycle Management** - this application provides workflows for processing retailer license applications and renewals (including online entry and submission via a public retailer licensing Retailer Customer Relationship Management (CRM) solution), compliance reviews with

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external partners, retailer onboarding/offboarding functions, and serves as the master system of record for all retailer-level data elements including terminal management.

- D. **Retailer CRM/Lottery Sales Force Automation** - this application provides functionality that allows Lottery sales representatives and other internal staff to manage a variety of data such as, but not limited to logging retailer visits/service calls, tracking, and communicating retailer performance/engagement data, and providing asset and ticket inventory management functions.
- E. **Lottery Retailer Portal Website** - this application provides a secure public-facing portal for retailers to access data regarding their accounts and to receive / send Lottery-related information. This includes sales reporting, invoice information, secure messaging, submitting applications or renewal paperwork, secure online messaging, view sent letters for current license information, view history, ask survey questions and results, view commissions / earnings, training resources and content, requests for service, etc. This portal should update the central gaming system and retailer account per rules defined by the lottery and view change history.
- F. **Lottery Workflow Automation** - this application provides automated business workflows and reporting for several internal business functions, including, but not limited to: customer complaints/questions/comments, public records requests, Lottery Security Investigations (e.g., high-tier claims reviews, ticket reconstruction requests, stolen ticket reports, background check requests, etc.), and retailer compliance inspections.

The DOR, Lottery Division’s goal for the future RFP is to maximize efficiencies of internal operations to become more streamline and transparent while providing all staff and other partners the ability to provide online, secure, and real time services. This includes, but not limited to, providing players new and innovative ways to pay players, while maintaining an electronic way to maintain claims data, opportunity to process claim payments online vs in person, ability to provide a CRM that involves secure messaging and the ability to place and view retailer applications, and renewals, licenses and view other reports.

Please provide the following information for each back-office solution / application that the Respondent supports:

- 8.1 Describe the current back-office functions the Respondent’s solution(s) can perform. Also note whether the solution(s) supports or combines multiple functions into a single application.
- 8.2 Identify which of the above back-office functions the Respondent does not support and would need to hire a subcontractor.
- 8.3 Briefly describe the technology infrastructure, data connectivity and licensing model used with the solution (e.g., Lottery-hosted, or vendor-hosted, on-premise or cloud-based, public internet or private network / VPN, Software-as-a-Service (SaaS) or dedicated license, etc.) and why such a design would be preferred.
- 8.4 What future back-office system innovations and technology, or new applications does the Respondent foresee?
- 8.5 How customizable is the Respondent's back-office solution and what is the process for requesting customization/automation?

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- 8.6** How often does the Respondent modernize their back-office solutions; are the releases automatic or fee-based to the customer?
- 8.7** Provide information regarding online claims payment systems, integration within a gaming system, managing online claim payments. What internal controls and security checks are in place for online claims management, and what alternative payment options are available for claims payments. We are also interested in your experience of providing tax forms to players, the type, updates to taxes, reconciliation of taxes and filing.
- 8.8** What experience and ability does the Respondent have integrating the back-office solution with other third-party solutions, such as other back-office applications, central gaming systems, Lottery POS devices, business intelligence applications, etc.? Describe whether the Respondent's solution can integrate with a single sign-on solution (Okta, Google account, etc.).
- 8.9** What differentiates the Respondent's solutions from their competitors?

## 9.0 CATEGORY 4: BUSINESS INTELLIGENCE (BI) APPLICATIONS AND DATA MANAGEMENT SOLUTIONS

This category integrates various lottery data sources and provides tools for users to readily access performance data and create customized visualizations and reports. The BI application provides users with the capacity and capability to use data analytics to enhance decision making and problem solving.

- 9.1** Describe the capabilities of the Respondent's BI solution, including examples of how it can provide actionable business insights and increased process efficiency.
- 9.2** Describe the methodologies by which the Lottery could access, control, and document the data being maintained within the Respondent's BI application / Data Management solution. Understanding that all methodologies must allow for the Lottery to maintain ownership of all data.
- 9.3** What, if any, third-party solutions, applications, platforms and/or tools does the Respondent include with its BI solution (e.g., Tableau, Power BI, Amazon QuickSight, Qlik, Informatica, SSIS, etc.)?
- 9.4** Briefly describe the technology infrastructure, data connectivity and licensing model used with the solution (e.g., Lottery-hosted, or vendor-hosted, on-premise or cloud-based, public internet or private network / VPN, SaaS or dedicated license, etc.) and why such a design would be preferred.
- 9.5** Describe the capabilities and available approaches to integrate data from multiple systems, and/or multiple vendors, to include detailed transaction-level data in real-time or near-real time. Describe any risks or obstacles with data integration and how they could be overcome.
- 9.6** How much customization, configuration, and process automation does the Respondent allow the client to make to their BI solution, and what is the process for requesting/creating those enhancements?
- 9.7** Describe where the Respondent sees their BI technology evolving and how the Lottery could



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leverage this technology to improve our strategic and operational objectives.

**9.8** What differentiates the Respondent’s solutions from their competitors?

## 10.0 CATEGORY 5: POINT OF SALE DEVICES, MONITORS, SIGNAGE AND RELATED SERVICES

This category covers all retailer POS devices, including retailer terminals, multimedia displays, vending machines, automated ticket dispensing hardware, jackpot signage, digital play centers, in-lane services, and products, etc., as well as related services such as installations, preventative maintenance and repair, and retailer support services.

**10.1** What types of retailer POS devices are offered, and what are their capabilities?

**10.2** What are the capabilities to upgrade, refresh, and/or enhance the devices over the contract term?

**10.3** What differentiates the Respondent’s POS devices and services from their competitors?

**10.4** What field services can the Respondent provide for their products? (Examples: delivery, installation/removal of equipment, retailer service hotline, paper and consumables, device preventative maintenance and repair, spare parts, training, and/or sales support services.) include in your response timeline, service level agreement.

**10.5** What multimedia capabilities and content standards are supported by the Respondent’s devices (e.g., HTML5) and how is this content developed, distributed, and managed?

**10.6** What experience and ability does the Respondent have integrating with third-party systems and hardware (e.g., Central Gaming Systems, multimedia devices, vending machines, and other retailer POS systems including in-lane functionality)?

**10.7** What data communications technologies are supported by the Respondents' devices (e.g., cellular/4G/5G, Wi-Fi, satellite, etc.) and what data communications services can the Respondent provide?

**10.8** What In-Lane experience, services, and products can the Respondent provide?

**10.9** What automated instant ticketing dispensing systems can the Respondent provide?

**10.10** Describe retail messaging and advertising opportunities available in the respondent’s solution to both players and retailers.

**10.11** Describe the services and processes used to enhance and keep sales device software up to date.

**10.12** What, if any, third-party vendors does the Respondent use to provide POS devices, monitors, signage, and related services?

**10.13** What differentiates the Respondent’s solutions from their competitors?

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- 10.14** Does the Respondent have a trade-in program, or something similar, for retailers to obtain new terminals or vending machines which may include features such as, but not limited to, smaller footprint, latest technology, more user-friendly interface, replace obsolete technology, etc. during the life of a contract?

## 11.0 CATEGORY 6: MOBILE APP, PLAYER ACCOUNT MANAGEMENT (PAM), PLAYER CUSTOMER RELATIONSHIP MANAGEMENT SOLUTIONS, PLAYER’S CLUB LOYALTY, and REWARDS PLATFORM

DOR, Division of Lottery’s current mobile app does not have PAM or CRM solutions in place. Our player loyalty programs are centered on in-person events and email notifications that are independent of the mobile app. DOR, Division of Lottery is interested in learning about player loyalty and mobile solutions and associated initiatives to engage and reward loyal players.

- 11.1** Describe the Respondent's current services and products for a mobile app solution.
- 11.2** In the area of mobile app-based loyalty platforms, player account management, and / or player CRM, describe the Respondent's current services and products. How do these solutions support and improve player engagement?
- 11.3** What differentiates the Respondent’s solutions from their competitors?
- 11.4** What data and behavioral information is or could be collected via the player loyalty platform with the app?
- 11.5** Describe the Respondent's player support services to respond and resolve player’s concerns and questions.
- 11.6** What emerging technologies and services is the Respondent working on to enhance player satisfaction and engagement?
- 11.7** How does the Respondent stay up-to-date with app store rules and regulations?
- 11.8** What are the capabilities and requirements for the Respondent’s solution to integrate with other systems, the Lottery website, business applications and third-party service providers (examples: integration with the Lottery’s Central Gaming System, back office applications, payment providers, loyalty rewards, mobile ticket cashing, etc.)?
- 11.9** What real time data and performance analytics can the Respondent's player application capture and provide to the DOR, Division of Lottery? What are the capabilities to integrate third-party consumer data?
- 11.10** What player segmentation tools, if any, are available on the Respondent’s player application to aid in engaging different player types?

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- 11.11** Describe how the Respondent’s loyalty platform communicates with members via email, push notifications and/or text notifications.
- 11.12** Provide examples, if any, of how the Respondent’s solution has aided and enhanced digital marketing efforts (e.g. paid and/or organic social media campaigns; digital media buys by the Lottery’s advertising agency) outside the CGS.
- 11.13** What are the capabilities and requirements for the Respondent to provide coupons to players?
- 11.14** Does the Respondent’s player application allow for game modernization and integration at the retail level (e.g. Digital play slips, shopping carts, purchase rewards, etc.)?
- 11.15** What are the Respondent’s capabilities for building and supporting a sweepstakes platform that combines interactive gameplay with the ability to purchase / win tokens that can be used to enter sweepstakes drawings?
- 11.16** Describe the ability to update the Respondent's solutions with new features that the Respondent or DOR, Division of Lottery may want to introduce.
- 11.17** Describe any and all mobile app functions that may not have been addressed above.
- 11.18** What differentiates the Respondent’s solutions from their competitors?
- 11.19** Describe your most robust mobile app solution to date and the impacts of this solution.

## 12.0 LIST OF REQUIRED FORMS AND DOCUMENTS

All forms and attachments are found in the Wisconsin eSupplier Portal in the "Supporting Documents" section.

ALL VENDORS

DOA-3832: Bidder Required Form

FOR HARD COPY ONLY

Attachment A: Bid Factors – FOR HARD COPY RESPONSE ONLY