Official – Sensitive – Commercial

Invitation to Tender for Customer Compass (OS Sentiment Tracking Survey)

1   Introduction

Ordnance Survey Ltd is a company registered in England and Wales (company registration number 09121572) whose registered address is at Explorer House, Adanac Drive, SOUTHAMPTON, SO16 0AS, UK (**OS**). OS is a limited company in which the entire share capital is owned by the Department for Business, Energy & Industrial Strategy (**BEIS**).

OS is Britain's mapping agency and is responsible for the surveying, production, maintenance and marketing of a wide range of geographic information, relied on by government, business and individuals.

Further information on us can be found on our website http://www.os.uk

2   Purpose of this document

OS is conducting this tender exercise for the purpose of procuring the goods/services described in the Statement of Requirements (**SOR**). Interested parties (**Participant** or **Potential Supplier**) should review this Invitation to Tender (**ITT**) and submit their completed Response Document (see Appendix 1) in accordance with Section 7 below.

This ITT contains further information about the procurement process, the SOR, and assessment questions for Participants to complete. Each Participant's response (**Tender**) should be detailed enough to allow OS to make an informed selection of the most appropriate solution.

3   Background

Background to Ordnance Survey

Ordnance Survey (OS) is Britain's official national mapping agency, providing mapping data and services to the UK Government, businesses, and the public, either directly or through partners.

Mapping data has numerous uses for businesses and government organisations, however, ultimately it helps with planning services and decision-making. In addition to providing mapping data to large businesses and organisations, OS have a retail website providing outdoor equipment, and digital and paper maps that can be used to plan walking and cycling routes, or for gifts (custom maps) and holidays etc.

Relationship with Government: OS currently has a licencing agreement, called the Public Sector Mapping Agreement (PSMA), that covers the supply of mapping data to a wide range of government organisations operating in the public sector. This agreement allows data to be easily shared across Government departments. The Government pay to have this agreement in place and are an important customer (the largest customer of OS), as well as being our only shareholder (Department for Business, Energy & Industrial Strategy, BEIS).

OpenData: The Government wanted to increase the general public's access to mapping data when the PSMA was introduced in 2010. To achieve this aim they arranged for some of the data collected by OS to be freely available to the public. The data made available is called "OS OpenData".

Background to the project

Ordnance Survey (OS) implemented a new customer perceptions survey in 2015 (Customer Compass), aimed at gathering real-time feedback to enable the business to address customer issues in a timely manner. Prior to 2015, OS measured performance through an annual study with customers. The approach to gathering feedback was changed from an annual survey to a continuous study in 2015, as it was felt that a one-off survey didn't provide an accurate picture of our performance over time.

The new approach to measuring customer sentiment was well received, with both OS Website and Service Delivery teams viewing the results on a daily/weekly basis to review comments and scores. Service teams can address customer's specific issues (close the loop) through an online portal, review performance by agent and understand common themes in results.

OS is going through a period of change and transformation that requires: a more customer-centric focus; shift in position from data capture/delivery to providing content/solutions and professional services; restructuring to reflect business priorities; and extending our reach internationally as well as maintaining a GB focus.

The OS Customer Compass perceptions study will need to maintain some consistency during this time to monitor the success of the business transformation (touchpoints measured and key questions), whilst offering the flexibility to adapt to business changes or to address challenges with the current approach.

To ensure the Customer Compass remains relevant, OS would like to re-fresh the programme and deliverables. The existing contract for the Customer Compass ends on the 29th July and OS would like a supplier in place by Mid July.

4   Overview of the project

OS wants to continuously track and monitor satisfaction with service delivery and website performance over time.

Points of contact:

There are three key touchpoints OS would like to measure within the study:

- Website performance (web exit survey)
- Customer service (email survey)
- Order and fulfilment process (email survey): OpenData & OS Orders

Market Facing Units (MFU's):

The OS business is divided into 3 market facing units. Results need to be analysed and reported by customer type:

- **OS GB:** Predominant focus Business to Government (B2G) and Business to Partners (B2P)
- **OS Leisure:** Predominant focus Business to Customer (B2C)
- **OS Ventures:** Predominant focus Business to Business (B2B)

Key performance indicators:

There are four main performance measures monitored:

1. Net Promoter Score (incorporated into OS bonus calculation)
2. Mission achievement (ability to carry out task online)
3. First time resolution (ability to resolve query first time)
4. Satisfaction

The Net Promoter Score (NPS) has been widely adopted as the key measure for understanding customer sentiment. NPS has formed part of the Key Performance Indicators (KPI) for the business for the last 2 years. The target for the business reflects the previous year's performance and any planned changes that may impact the score over the year ahead. It is weighted in line with business revenue from the customer types listed in the MFU section.

Deliverables

The programme of activity should provide:

- Real time customer feedback and reporting
- Closed loop reporting (e.g. automated alerts of negative/positive feedback, ability to view comments and record actions taken)
- Dashboard/ key metric reports
- The ability to interrogate data and trends
- Quarterly deep dive reports highlighting best practice and recommending actionable improvements
- Ability to respond to hot topics – through flexible questions focused on key business changes or issues

5   Communications and timetable

5.1   General

5.1.1   English is to be the language for all communications between OS and Participants on all matters relating to this tender.

5.1.2   Participants must each appoint one individual who will continue to be responsible for all communications with OS and to whom OS should address any enquiries during the tender process. The name, address, telephone and fax numbers and e-mail address of the Participant's contact must be notified (or confirmed if unchanged from that previously provided) to OS's main contact at the address given below within 5 working days of the date of issue of this ITT. Any subsequent changes to the Participant's contact details are to be notified to OS as soon as reasonably practicable.

5.1.3   All formal communications (including, but not limited to, the submission of responses) to OS are to be made in writing to **OS's Main Contact** as follows:

Caroline Eadie
Supplier Relationships Manager
Ordnance Survey, Explorer House, Adanac Drive, SOUTHAMPTON, United Kingdom, SO16 0AS
Phone: 02380 055091
Email: tenderenquires@os.uk

5.1.4   OS will notify Participants of any changes to the contact details listed above.

5.2   **Outline Timetable**

5.2.1   The timetable for each stage of the remainder of the procurement process from issue of this ITT to contract award is estimated to be as follows:

Event	Target date
Contracts Finder Contract Notice, Issue ITT	14th June 2017
Deadline for receipt of clarification questions	12 noon 26th June 2017
Date of submission of Tenders	12 noon 3rd July 2017
Tender evaluation	10th July 2017
Contract Award Decision Letter and Unsuccessful ITT Letters issued	17th July 2017
Contract Award	17th July 2017
Contract Award Notice Published	20th July 2017
Commencement Date of Contract	24th July 2017
Implementation / Transition begins	24th July 2017

OS may change this timetable at any time at its sole discretion.

5.3   **Participant Requests for Clarification**

5.3.1   OS recognises that clarification may be needed prior to submission of Tenders.

Participants should submit their questions, queries or clarification responses to OS's Main Contact, as detailed in Section 5.1.3 above.

5.3.2   All clarifications and responses will be logged and recorded by OS. OS will endeavour to respond to all clarifications within 5 working days of receipt. If the response is not going to be available within 5 working days then the originator of the clarification will be advised of when a response will be given.

5.3.3   Participants should clearly identify any clarifications or parts of clarifications which they consider to be confidential or specific to its proposed solution, stating the reasons why it considers the clarification to be so. OS will decide at its sole discretion whether or not to accept the Participant's request. If OS does not accept the request for confidentiality or does not accept that it is specific to its proposed solution, the Participant will be informed and OS will specify a period within which the Participant may choose to withdraw its clarification. If the Participant does not withdraw its clarification in such circumstances, OS will proceed to respond on a non-confidential basis.

5.3.4   The cut off for receipt of clarification questions is **12 noon on 26th June 2017.**

5.4   **OS Requests for Clarification**

5.5.1   Any requests from OS to a Participant to clarify, specify or fine-tune a tender following receipt of Tenders will be submitted via email to the Participant's nominated point of contact in the completed Response Document. Participants shall endeavour to respond to all such requests within 3 working days of. If the response is not going to be available within 3 working days then OS should be advised of when the response will be given as soon as is reasonably practicable but in any event no later than the initial 3 working day period.

5.4.1   OS may, in its evaluation of Participant's proposals, request demonstrations and/or site visits. Participants must accept responsibility for organising and providing any required demonstrations and/or visits. Participants must bear their own costs for such demonstrations and/or visits.

6   General Notices

6.1   Exclusion Of Liability

OS reserves the right to cease this procurement process at any time without any liability (whether in contract, tort or negligence) to Participants.

Each Participant considering entering into contractual relationships with OS on the basis of the information provided in this ITT should make their own evaluation of the information provided pursuant to the ITT and make their own investigations and form their own opinion on OS and the project. Participants are recommended to seek their own financial and legal advice.

OS reserves the right not to enter into a contract with any Participant without any liability (whether in contract, tort or negligence) for any loss, cost or expense (including legal expenses) incurred by Participants in preparing for or participating in this procurement process, howsoever arising (whether under contract, tort or under any statutory provision or otherwise). OS is not liable for any costs Participants may incur in contemplation of a contractual relationship being entered into.

6.2   Contractual Relationship

Nothing in this ITT or any other pre-contractual documentation shall constitute the basis of a contract that may be concluded in relation to this procurement exercise, nor shall such documentation be used in construing any such contract.

Each Participant must rely on the terms and conditions contained in any contract when, and if, a written contract has been signed and countersigned by both parties and dated, subject to such limitations and restrictions that may be specified in such contract. It is envisaged that the successful Participant's responses to the requirements set out in this ITT will be included in any contract.

6.3   Accuracy of information

This ITT has been compiled in good faith. It is intended to provide sufficient information for Participants to provide a full and firm proposal. OS considers that all information (including numbers and other figures) given in this ITT and any information provided pursuant to this ITT is accurate at the time of preparation, but may change in the future. However, neither OS nor its financial or legal representatives, officers, agents or employees make any representation or warranty, or accept any responsibility for the information contained in this ITT (or any other information provided pursuant to this ITT) or for its fairness, accuracy or completeness, nor shall such persons be liable for any loss or damage arising as a result of reliance on such information or any subsequent communication. There is an absolute obligation on each Participant to query any perceived ambiguity in this ITT (or any of its associated documents) whether actual or potential, in the use of technical, functional or other terms. It is the participant's sole responsibility to undertake whatever investigation and due diligence it considers to be appropriate in order to verify the accuracy of any information provided to it by OS through the ITT process.

6.4   *Freedom of Information Act 2000* (FOIA) and *Environmental Information Regulations 2004* (EIR)

OS is committed to open government and meeting its legal responsibilities under FOIA and EIR. Accordingly, any information submitted to OS (including, without limitation, the information contained in this ITT and the Tender submissions received from Participants in response) may need to be disclosed by OS in response to a request for information.

OS may also decide to include certain information in the relevant publication scheme maintained under the FOIA or EIR. In making a submission, each Participant therefore acknowledges and accepts that the information contained therein may be disclosed under the FOIA or EIR.

In respect of any information submitted by a Participant that it considers being commercially sensitive the Participant should:

- Clearly identify such information as commercially sensitive;

- Explain the potential implications of disclosure of such information; and

- Provide an estimate of the period of time during which the Participant believes that such information will remain commercially sensitive.

Please submit responses to each of the above in Appendix 1 and include with the completed ITT submission.

However, Participants should be aware that even where a Participant has indicated that information is confidential or commercially sensitive, OS is responsible for determining, at its absolute discretion, whether such information is exempt from disclosure under the FOIA or EIR, or must be disclosed in response to a request for information.

Participants should also note that the receipt by OS of any information marked 'confidential' or equivalent does not mean that OS accepts any duty of confidence by virtue of that marking, and OS has the final decision regarding the disclosure of any such information in response to a request for information under the FOIA or EIR.

In making a submission in response to this ITT, each Participant acknowledges that OS may be obliged under the FOIA or EIR to disclose any information provided to it.

6.5   **Government Transparency Agenda**

Government has set out the need for greater transparency across its operations to enable the public to hold public bodies and politicians to account. This includes commitments relating to public expenditure, intended to help achieve better value for money.

As part of this agenda, Government has made the following commitments with regard to procurement:

- Publication of all new tender documents over £25,000 and their respective timetables; and
- Publication of all new contracts over £25,000.

Participants should therefore note that this ITT and resulting contract awarded will be published on the following websites:

- OS: http://www.os.uk; and
- Contracts Finder: https://www.contractsfinder.service.gov.uk.

OS may, at its sole discretion, make limited redactions to the information it publishes.

6.6   **Confidentiality**

All documents and information contained in this ITT or provided during the tender process are, and shall remain, OS's property. Participants shall not disclose either:-

- the fact that they have been invited to tender or release details of the proposed contract; or
- details of their Tender in whole or in part,

other than on an 'in confidence' basis to those who have a legitimate need to know or WITH whom they need to consult for the purpose of preparing the Tender.

Participants may only use information provided by OS to respond to the requirements set out in this ITT.

OS reserves the right to copy and electronically distribute all or any part of any Participant's Tender exclusively for the purposes of analysis and assessment. Submission of a Tender shall be deemed as confirmation of OS's right to do such acts.

6.7   **Cost of preparing response**

Each Participant will be responsible for all costs and expenses it incurs:

- in providing responses to this ITT and any other communications, including, without limitation, responses to any invitation to participate in meetings, technical demonstrations and workshops held at OS's offices; and/or
- in any further stages of this procurement; and/or
- in obtaining any additional software and/or hardware and relevant licenses required in order to provide a full response to this ITT; and/or
- in obtaining or providing any additional information required in order to facilitate the evaluation process.

OS accepts no liability for any loss, liability, cost or expense (including legal expenses) incurred by any Participant in preparing for or participating in this tender process, howsoever arising (whether under contract, tort or under any statutory provision or otherwise).

6.8   **Publicity**

Participants may not make any public statements or undertake any promotional activity relating to this procurement without OS's express prior written consent.

6.9   **Conflict of interest**

Participants are responsible for ensuring that there are no conflicts of interest either between their own advisers and those of OS, or between the members of its consortium and their sub-contractors. Participant must notify OS of any actual or potential conflict of interest as soon as reasonably practicable as soon as it becomes aware of such a conflict and the measures it has taken and/or proposes to take to deal with such a conflict.

6.10   **Non-canvassing, non-collusion, compliance with *Bribery Act 2010* and The *Modern Slavery Act 2015***

OS takes a zero-tolerance approach to bribery. Participants must have demonstrated that they take a robust approach to bribery prevention through either written policies or oral communication and training of its staff and agents.

OS also takes a zero-tolerance approach to slavery and is committed to preventing acts of slavery and human trafficking (as set out in the *Modern Slavery Act 2015* (**MSAct**)) from occurring within both its business and supply chain. Ordnance Survey will expect any successful Contractor to be able to ensure it, and its supply chains, are compliant with the MSAct.

Participants must not canvass or solicit or offer any gift or consideration whatsoever as an inducement or reward to any officer or employee of, or person acting as an adviser to, OS in connection with the submission of a Tender, evaluation of responses, short-listing of Participants and in connection with the overall procurement exercise.

Participants must submit a bona fide response and confirm, by a signed return of the certificate contained in Appendix 1, that it has not prepared its response in collusion with any third party and will not engage in collusive behaviour during the tender process.

7   Tender Submission Instructions

7.1   Participants are invited to submit Tenders in accordance with the required responses set out in Schedule 1 (inclusive) of this ITT.

7.2   Tenders must be returned by **12 noon on Monday 3rd July 2017**. Late Tender submissions may at OS's sole discretion be rejected. It is the Participant's responsibility to ensure that the Tender submission is received on time.

7.3   All documents to be completed in text point size not below 10 in the English (UK) language.

7.4   Participants should ensure that their Tender contains all information required for evaluation. In particular, Participants should ensure that an adequately detailed response is given to each item in the 'response required from Participant' section of the Statement of Requirements. Web-links or other external references will not be taken into consideration.

7.5   All prices in the Tender must be fully priced in Sterling (£) exclusive of VAT and totalled in clear terms. Tender must remain open for acceptance or non-acceptance for not less than 120 days from the tender closing date.

7.6   Tenders should contain all of the information as required in this ITT.

7.7   Subject to paragraph 7.14, the name of the Participant must be clearly indicated at the top of each Tender. The Tender and all supporting documentation should be page numbered and cross-referenced to this ITT where appropriate and should be fully indexed.

7.8   Tenders must be valid for a period of 4 months from the date of submission.

7.9   OS reserves the right to carry out reference checks and/or financial checks prior to the award of contract(s). By submitting Tenders the Participant will be deemed to have given such consent.

7.10   Do not include publicity material of any kind, for example brochures and web references, unless specifically requested, as it will not be evaluated.

7.11   Do not reference your answers from 1 requirement, or question, to another, even where there is commonality.

Electronic Tender Submissions

7.12   The information and documents relating to this procurement will be accessible via Contracts Finder (https://www.contractsfinder.service.gov.uk).

7.13   Tender submissions should be submitted via email by no later than **12 noon 3rd July 2017** as a single WinZip® file (identified with the Participant's company/organisation name). Participants are reminded to allow sufficient time in submitting their Tenders prior to the closing date and time (shown above). Participates should submit their responses to TenderEnquires@os.uk, cc caroline.eadie@os.uk.

7.14   Submissions will not be permitted after the stated deadline has passed.

7.15   Participants must ensure that each document is clearly labelled with the name of their organisation and a title, identifying the content (i.e. Smith PLC - Tender.doc, Smith PLC – appendix1.pdf). Please allow sufficient time for all documents to be uploaded before the closing time of the tender.

7.16   Where signatures are requested, typed entries are acceptable. Electronic signatures are not required on electronic tenders.

8   Requirements, Evaluation and Award criteria

8.1   The criteria are as follows:

a)   the Participant's response to the commercial requirements;

b)   the Participant's response to the technical requirements; and

c)   the Participant's response to the pricing requirements.

8.2   OS's requirements are set out in Schedule 1 and it has allocated each of the criteria an overall weighting (expressed as a percentage) reflecting its relative importance to OS:

d)   response to the commercial requirements   15% (Total marks available 120)

e)   response to the technical requirements   65% (Total marks available 200)

f)   response to the pricing requirements   20% (Total marks available 100)

8.3   Further detail concerning the requirements, sub-criteria, sub-weightings and marking schemes are contained in Appendix 1 Requirements Response Document The commercial, technical and pricing requirements will be evaluated using the following scoring methodology:

Score	The Participant's response:
0 (Inadequate)	a) does not provide a response to the requirement/s; or b) responds to the requirement/s, however fails to address the specific issues (if any) identified by OS; or c) fails to provide any evidence (where applicable) to support its response.
1 (Concerns)	a) responds to the requirement/s, however, has only partially addressed the specific issues (if any) identified by OS; and/or b) provides insufficient evidence (where applicable) to support its response; and/or c) responds to all the requirement/s with insufficient detail raising significant concerns about the Participants ability to meet all the requirement/s; and/or d) provides a response which raises significant concerns about the Participants ability to meet the requirement/s.
3 (Potential)	a) provides a full response to the requirement/s, however the supporting evidence only partially addresses the requirement; and/or b) provides a response to the requirement/s, which raises concerns about the Participant's ability to meet the requirement/s.

5 (Capable)	provides a full and comprehensive response to the requirement/s, supported by evidence (where applicable), to indicate the Participant can fully meet the requirement/s and does not raise any concerns about the Participants ability to meet all of the relevant requirement/s and/or to deliver the services to the required standard.

Note that:

If a score of **0** is applied, the Participant may be **eliminated.**

If a score of **1** is applied, $^1/_5$ **available marks** for that question will be awarded (rounded up to the nearest whole number).

If a score of **3** is applied, $^3/_5$ **available marks** for that question will be awarded (rounded up to the nearest whole number).

If a score of **5** is applied, **all available marks** for that question will be awarded.

Example:

If there are **10 marks** available for a question and a score of **3** is applied to a Participant's response, the Participant will be awarded **6 marks** for that response.

If there are **5 marks** available for a question and a score of **3** is applied to the Participant's response, the Participant will be awarded **3 marks** for that response.

Schedule 1   Specification & Detailed Requirements

9.1   Background

OS is going through a period of change and transformation that requires: a more customer-centric focus; shift in position from data capture/delivery to providing content, solutions and professional services; restructuring to reflect business priorities; and extending our reach internationally as well as maintaining a GB focus.

The OS Customer Compass perceptions study will need to maintain some consistency during this time to monitor the success of the business transformation (touchpoints measured and key questions), whilst providing the flexibility to adapt to business changes or to address challenges with the current approach to capturing feedback.

To ensure the Customer Compass remains relevant and actionable over the next 3 years, OS would like to re-fresh the programme and deliverables. The existing contract for the Customer Compass ends on the 29th July and OS would like a supplier in place to deliver this service by Mid July.

9.2   Business objective:

Proposals should provide information on your agencies experience and capability to meet these objectives.

Provide actionable recommendations and timely feedback regarding the customer experience, so that MFU's can focus resources on improving the customer journey, sales (e.g. website conversion), and retention.

9.3   Research objectives

- Track and trend key performance measures (satisfaction, resolution and NPS) over time, identifying differences in feedback by point of contact or customer type

- Understand key drivers impacting upon key performance measures and recommend areas for business improvement

- Benchmark performance against best in class service providers to understand performance in context

- Monitor the impact of service delivery changes through hot topics and detailed analysis of results

- Establish customer expectations for service delivery and monitor performance against expectations

- Compare internal service delivery KPI's against customer feedback (e.g. website outage, call volumes, call SLA's)

- Recommend continuous improvements to the customer perception study (Customer Compass)

- Suggest methods to increase employee engagement with results

- Continually review the research approach to ensure the highest level of response is achieved

- Report on actions from closed loop activity – how many customers were re-contacted? Reasons for re-contact?

9.4   Research approach

Initially the Customer Compass should focus on three main points of contact with OS (outlined below).

There are challenges with the existing approach to gathering feedback.

Proposals should suggest ideas for tackling these challenges and ideas for improving upon the current approach.

Website

OS currently have one website to meet the needs of four distinct audience types (B2B, B2P, B2G & B2C).
This website is maintained by two different teams within OS:

1. A team focused on the retail site (OS Leisure); responsible for the sale of paper maps (personalised and pre-printed), outdoor equipment and online maps.

2. A user experience team that reviews the content and customer journey of all other visitors to the website (predominantly B2B and B2G). The content is focused on providing information rather than a shop experience. However, B2B and B2G visitors can order OpenData on the website, obtain a quote for large datasets and existing customers can log into an online order platform.

Methodology: Web exit survey

- An invite to the survey is **triggered from specific pages on the website to every nth visitor**
- The survey asks a series of **questions to identify the audience type**
- The survey is **routed by visitor type** (e.g. B2C visitors are asked about the retail site, B2B/P/G are asked about the product information section of the website)
- **A monthly prize draw** incentive is offered for participation
- **A 3-month exclusion period** is applied to stop repeat visitors being continually asked for feedback

Challenges

- **Self-identification of customer type doesn't accurately correspond to the section of the website visited.**

  For example: a small business correctly identifies themselves as business, however they want a solution on our retail site (subscription to OS maps) rather than a large GIS data solution. Their categorisation as a business means the customer feedback is shown to the wrong MFU – OS GB instead of OS Leisure

- **Response by audience type is low** *(April responses shown in table below)*

	B2C	B2B	B2G
April	225	15	11

- **Existing survey is long and needs to be revamped**
- **Feedback can't be tracked to the page/part of the website visited.** Currently site analytics or the trigger point for the survey isn't captured and analysed. This means that when the user experience team make a change to a specific page or part of the website they are using a different survey to capture the page feedback. Creating a poor customer journey for any visitors triggering both surveys.
- **B2G and B2B visitors are more likely to be returning/repeat visitors**
- In time OS may consider providing different websites dependent on customer type. If this happens the agency/approach needs to be flexible enough to split feedback by website.
- **The survey is not triggered from every page on the website**. Is it possible to add more parts of the website?

Specific deliverables

- Ability to review feedback by page of the website visited, customer need and customer type
- Separate reporting for the OS leisure team and OS User Experience team
- Real-time feedback via a dashboard
- Ability to link feedback to site analytics
- Benchmark of OS website versus best in class
- Closed loop alerting
- Hot topic questions relating to site developments

Customer Service (CSC)

The customer service team deal with general enquiries from all customer types.

The largest B2G, B2B and B2P clients have account managers and therefore are more likely to contact CSC to report errors on a map rather than a general product query. Most other queries can be dealt with by account managers. However, the partner model is changing in 2017 and only the largest partners will have a dedicated account manager. This may lead to more being serviced through CSC.

Website queries and general queries from the public will be dealt with by CSC as a first port of call.

Methodology: Email survey

- **Every week a sample is provided to our existing agency containing contact details of those whose query has been fully dealt with and logged on our Customer Relationship Management system** (Dynamics). The research agency de-dupe the file to remove people previously contacted and send out the survey within 2 days of receiving the sample. The survey is run on a continuous weekly basis.

- **A 3-month exclusion period** is applied to the sample to ensure that people are not over surveyed
- **Sample data is appended to the results** for analysis and to allow interrogation by audience type
- **One survey has been designed to cover all customer types**
- **A reminder invite should be sent one week after the initial invite**
- **No incentive is offered for completion**

Challenges

- **Response is low:**

	B2C	B2B	B2G
April	164	14	26

Deliverables

- Ability to review feedback by customer need / customer type
- Real-time feedback via a dashboard
- Benchmark of OS website versus best in class
- Benchmark versus call KPI's
- Closed loop alerting
- Expectations versus performance benchmarked
- Hot topic questions relating to topical business questions

Order & Fulfilment

There are two ordering platforms for requesting data from OS:

1. **The OpenData ordering website**, which is available to any member of the public. However, whilst anyone can order OpenData, the datafile delivered from the system would require some GIS knowledge to interpret; and
2. **The OS Orders platform**, which is available to B2B and B2G customers. Clients need to login to order data and are likely to be repeat visitors to the ordering platform.

Methodology: Email survey

- Initially the study was set up to be a continuous survey, with invites being sent on a weekly basis. However, most customers placing an order repeatedly visit the site and the response rate diminished over the first 2 months. To counter this **the survey is sent out on a 6-monthly basis to everyone who has placed an order within the last two months.**

  For example: In June the survey would be sent to everyone placing an order during April and May.
- **Sample data is appended to the results** for analysis and to allow interrogation by audience type
- The survey is **routed by length of time customers have been ordering data**
- **Two different surveys are in operation**; one for OpenData users and one for OS Orders
- **Customers appearing on both data files would only be offered one survey** – OS Orders is prioritised over the OpenData survey
- **A 3-month exclusion period** is applied to stop those who have repeat orders being continually asked for feedback
- **A reminder invite is sent one week after the initial invite**

Challenges

- **Response is low** (Example shown from December 2016 survey - Oct/Nov orders)**:**

	Sample	Responses	Response rate
OpenData*	4,398	634	14%
OS Orders	2,001	115	6%

*run in-house by OS in December 2016

- **Existing survey is long and needs to be revamped**

Deliverables

- OS Orders and OpenData results closed loop alerting
- Real-time feedback via a dashboard
- Expectations versus performance benchmarked
- Hot topic questions relating to topical business questions

Deep Dive Investigations

- This year OS want to have the flexibility to conduct "Deep Dives" into topic or service areas. For example: In-depth interviews with customers who found navigation an issue.
- There may also be a requirement to add new touchpoints to the survey e.g. OS provide a list of email addresses of customers who have bought an OS Maps subscription and understand their attitudes to OS Maps and the buying process.
- Please provide a cost for setting up a new survey, sampling and analysis of 'ad-hoc' surveys, which can fit alongside the main tracking programme.

9.5   Deliverables

Required

- Quarterly deep dives into results (F2F presentation and report), including actionable recommendations
- Online Dashboard(s)
- Closed loop alerting and response portal
- Key driver analysis – Importance versus performance
- Ability to interrogate data online and extract verbatim
- Comparisons with OS internal metrics (metrics to be provided by OS)
- Questionnaire writing and review to ensure relevance to our business
- Account management: continuous recommendations for improving the survey, dashboard, and reporting

Preferred

- Monthly KPI topline
- Industry benchmarking
- Expectations versus performance monitoring
- Automated excel reports and verbatim
- Hot topic monthly questions
- Linking with OS web analytics

9.6   Selection criteria

9.6.1 Understanding of the brief
A. Goes beyond just re-stating information in the brief
B. Demonstrates knowledge about the service OS provide/industry
C. Demonstrates knowledge about the website

9.6.2 Research expertise
A. Demonstrates experience of conducting (email and online) tracking studies
B. Demonstrates experience of running large scale research projects
C. Shows evidence of experience and expertise at communicating/delivering results
D. Demonstrates ability to turn insight into action

9.6.3 Overall research design
A. Suitability of proposed methodology

B. Appropriate construction of question areas

C. Expertise at communicating/delivering results

9.6.4 Deliverables

A. Suggests suitable and relevant deliverables

B. Goes beyond re-stating deliverables listed in the brief

C. Shows evidence of ability to deliver/provide tailored data/reports (online or excel)

D. Provides online access to results and real time reporting:

- Access to a real-time <u>analysis</u> platform for research team, which is easy to use (min. 4 users)
- Online closed loop reporting platform for service areas, which is easy to use (min. 10 users)
- Online real-time dashboards/results for all internal stakeholders

9.6.5 Account management and value added services

A. Outlines approach to account management and experience of account management team

- Outlines roles and responsibilities (e.g. day to day contacts, presenters, etc.)
- Frequency of (sample and response) updates
- Process for reviewing and refreshing the study, methodology and reporting

B. Demonstrates ability to add value above and beyond reporting trends (examples – not an exhaustive list - below)

- Industry benchmarking (preferable not mandatory)
- Deep dive investigations – more exploratory research into topic areas (quote as optional)
- Hot topic questions – the ability to add/remove topical questions each month
- Additional analysis and interrogation of data

9.6.6 Price

A. Pricing is in-line with like for like costs for providing the complete service

B. Ability to tailor the pricing to reflect internal budgets (e.g. full breakdown of costs provided)

C. Pricing includes all project deliverables :

- Set up (including system integration)
- Account and project management (number of hours per month)
- Sampling and responses
- Presentation including travel and expenses (aligned to OS Travel & Entertainment policy)
- Dashboard creation and management

9.6.8 Contract terms

The chosen agency will need to agree to the OS standard contract terms to be considered for this project. If there are any terms that will be an issue for your organisation, then please highlight these as part of the clarification questions process by 12 noon 26th June 2017.

Schedule 2   Draft Contract

Adobe Acrobat
Document

APPENDIX 1   Statement of Requirements Response Document

ITT Response
Document BS0554.2