



PROJECT ENGAGEMENT LETTER

How to complete:

1. Client Department engages with Supplier to complete pages 3 and 4
2. Once agreed, Client Department completes cover note on page 5 and sends to Supplier
3. Supplier completes letter on page 2, and sends to FST

(This is page 1)

Alastair McKie
EU Exit Call Off Manager
PA Consulting
10 Bressenden Place, London, SW1E 5DN

Functional Support Team
1 Horse Guards Road
Westminster
London SW1A 2HQ

15th November 2018
Ref: DIT-157

Dear Mike Potter/"FST",

Re: Support for DIT – Design and Project Management Resource for a Business Enquiry Service for the Department for International Trade [Departmental PO Ref Number 423000016913 under the provisions of our existing "Provision of Cabinet Office Consultancy Support for EU Exit" contract (Ref CCCC18A29)]

Following our recent conversations with Martin Cook of DIT and Alastair McKie and Karen Cherrett, I am pleased to confirm the details of our engagement for support of the Business Enquiry Service Support service. We appreciate this opportunity to assist you and look forward to working closely with you and your future team.

This letter describes the scope of the services we will provide, our fees for those services, and any other additional arrangements. We would be grateful if you could sign this letter in the space provided to confirm your agreement with these arrangements and return a copy to Alastair McKie (alastair.mckie@paconsulting.com) at your earliest convenience.

Yours sincerely,



Mark Brett
Head of Public Sector Consulting

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AGREED AND ACCEPTED BY FST:



By: _____
Signature

By: Mike Potter, Director EU Capability

Background

The Department of International Trade ("DIT") is preparing a service to respond to enquiries from businesses on DIT's areas of competence, arising from EU Exit. Whilst significant work has been led by BEIS in developing an online platform to respond to business information requests, DIT assume that UK and overseas businesses will nonetheless contact DIT staff who engage with businesses in the UK and overseas with additional questions. This DIT contact management capability is therefore being developed as part of DIT's contingency planning for business readiness for EU Exit and is separate (and in addition to) the wider Public Information Campaign being developed by BEIS/Cabinet Office.

DIT plans are, therefore, focussed on

- Ensuring that every contact is responded to.
- Utilizing an approach that is as digital as possible, building in surge staffing (for an unknown number of calls) and preparation of scripts for staff to use.

However, beyond April 2019, in order to

- Maintain momentum on DIT acquisition of Foreign Direct Investment
- Ensure that overseas businesses have the information they need to maintain confidence in trading with the UK
- Ensure that DIT staff are equipped to support companies to access the new opportunities arising from new Free Trade Agreement

DIT will need to build out this service and provide a much greater range of information and sales collateral to our teams.

This proposal therefore is about establishing a robust operational unit to respond in a way that enhances the prosperity of UK business with what is likely to be a significant flow of questions – both from the UK and overseas – and to develop DIT staff to support proactively ongoing export and investment performance.

DIT has created a skeleton service to respond to queries from business, which is currently operational receiving low volumes of enquiries. The next stage for DIT is to expand this into a Minimum Viable Product by late November – the MVP will consist of putting in place

- A software system (ZenDesk Elite) to manage the flow of enquiries
- A clearly defined set of processes for each stage of the client journey
- A set of MI which allows us to keep senior management informed on a daily/weekly basis of the volumes passing through the system, and - as a minimum - information about the source of each enquiry, what the issue was about and average response times.
- A process to train additional staff on the necessary elements of the ZenDesk system so that they can – if volumes increase – be capable (following initial training) of leaving their day jobs and moving onto enquiry handling without any additional training requirement.

Statement of Services

DIT require two workstreams and activities to deliver the following outcomes:

1. Development of plans to ensure that the DIT Business Services Support is capable of being developed to full operational capacity (see Annex A) by 1st April 2019.

2. Development of plans to ensure that staff at post are fully trained on the EU EXIT trade position post March 2019 so they can give informed advice to overseas organisations on how to trade with the UK post EU Exit. This relates to development of training plans and content for c 2,500 staff both in the UK and overseas. Delivery of that training is not within scope.

A key operational assumption for PA in this work should be that work will be completed by 11 January 2019 and that their work will include development of a transition plan to ensure that any ongoing elements can be handed over to replacement resource that DIT will bring in.

PA will start work on 19th November, 2018 and complete the schedule of works by 11th January 2019

Activities and deliverables

We will provide the following deliverables:

Deliverable	Date
Review of skeleton/MVP to determine current functionality and production of project plans to take skeleton to functioning MVP	23/11/18
Assess likely volumes and advise on size of "reservist team" needed in different scenarios and on likely bottlenecks. Set up critical paths.	23/11/18
Deliverable to consider volumes in respect of deal/no deal scenarios.	30/11/18
Set up ISO 9001-type system to ensure documentation is managed consistently by all	23/11/18
Advise on light-touch governance required to provide assurance against a project moving at speed but which has impact on (and is impacted by) a number of other areas within DIT	30/11/18
Set up a documented process for the training of staff both on <ul style="list-style-type: none"> • how to use the necessary parts of the ZenDesk Elite system to manage the flow of enquiries, and • the other processes to follow to ensure that enquiries are handled in accordance with DIT requirements – for summary see Annex B Ensure that systems set up are capable of being utilised by DIT staff once PA are no longer on-site	30/11/18
Set up processes and systems to monitor what is working and what isn't and to make rapid changes when things aren't working whilst minimising negative knock on effects. Ensure that these processes and systems are understood and usable by DIT staff, and are handed over to them to use in advance of the end of the work in this contract – or by 14 th December at the latest	Ongoing
Development of ongoing plans (key activities will be preparation of critical paths, demand management analysis, recommendations on future staffing, proposed budgets, training and system requirements). This to include provision in timetables to allow for completion of any relevant governance and approvals – DIT to be responsible for providing details of the timelines within their approvals processes.	11/01/19

Review of other government call centre and communication activity to identify re-use and ensure alignment of plans and potential for cross-departmental working.	30/11/18
Development of approach for handling "tiering" of "big" companies in terms of what additional high-quality service might be offered and in alignment with existing DIT Customer Relationship Management Approach.	07/12/18
Creation of plans for training staff at post and in the UK. This would cover design of a training package and co-ordination of the necessary resource within DIT to provide the content. Total number of staff to be trained – up to 2,500, hence the use of digital channels and media is preferred. Delivery of the training is not in scope. The content of the training will cover – as a minimum, but subject to ongoing discussions within DIT could include other elements to be defined – the structure of a Free Trade Agreement and how to explain to business how to take advantage of them (which training will enable staff to have a general understanding of the structures of an FTA so that as new ones are negotiated they can explain to business how to take advantage and build plans to ensure that the provisions in the FTA are utilised as fully as possible)	11/01/19
Creation of a curriculum of training to be deployed in 19/20 which will provide staff both overseas and in the UK with the content that they need to be able to successfully project the UK as a partner of choice for companies globally post EU Exit.	11/01/19

Assumptions

Activities, deliverables and team effort outline in this letter has been based on the following assumptions:

- Our team will have the necessary access to stakeholders as required to complete agreed activities. The definitive list of stakeholders, (and diary/workshop schedules), will be defined during Mobilisation
- Any relevant content to be provide at the call centre or for overseas posts will be provided by DIT.

Limitations on scope

Unless our instructions are later amended in writing, the work we undertake will be restricted to that set out above. You may decide you wish to vary this scope as the engagement progresses. We will discuss any such variations with you and agree the impact to our support, including any impact on fees, in writing.

In providing the services detailed above we will be acting in reliance on information provided by yourselves and your advisors.

Our team

Name	Role	Description
Shaun Delaney	Partner in Charge	Overall accountability for PA's work in satisfying this engagement letter.
Karen Cherrett	Assignment Manager and Subject Matter Expert	Karen will provide the day to day management of PAs deliverables and subject matter

		expertise for reviewing the contact centre solution and plans.
Ryan Lenton	Call Centre Design and Implementation lead	Ryan will be responsible for the baselining, design and implementation activity.
David Lewis	Sales Training Designer	David will lead on the development of the training plans (including content & delivery details) for the overseas posts, including engagement with all key stakeholders

Our fees

Our Fees to deliver the above are:

Consultant	Daily Rate	Days	Total fees
Shaun Delaney	£1,900	2	£3,800
Karen Cherrett	£1,700	16	£27,200
Ryan Lenton	£1,190	36.7	£43,673
David Lewis	£1,700	32	£54,400
			£129,073

FST will reimburse PA Consulting for work done on a time-incurred basis, charged according to the fee tables above. We estimate that the total fees for the scope of work detailed in this letter will be £129,073 excluding VAT and expenses. We will keep an accurate record of time spent by our staff in providing the services and provide supporting narrative for weekly reporting meetings.

VAT will be added to our fees at the prevailing rate. Fees will be invoiced monthly in arrears. Any travel expenses outside of London will be re-charged at cost as per DIT's standard expenses policy.

Governance and Reporting

The PA team will be led by Karen Cherrett as your commercial point of contact for this work. Karen will be responsible for all aspects of delivery within the PA team including the production and sign-off of deliverables, time recording/reporting, status reporting and project financials. Shaun Delaney will be the Partner in Charge and has ultimate accountability for PA's deliverables.

Karen will be accountable to Martin Cook in the governance structure and work alongside you to develop and execute the assignment. Karen and the PA team will produce a weekly status report for each work package detailing the following information:

- Summary status of assignment progress
- Progress against core deliverables
- Status and actions against project risks and issues

- Budget spent against originally agreed budget.

Feedback and satisfaction

There will be weekly reporting meetings between Martin Cook and Karen Cherrett from the PA team to discuss the contents of the weekly status reports. Project Managers from other projects will attend as required.

There will also be regular meetings between Martin Cook and Shaun Delaney from PA at key points in the project to monitor progress and sign off the deliverables for the contract. We suggest that initially these meetings should occur every two weeks.

At the end of the assignment, a 'Post-Assignment Feedback' review will be undertaken with you and / or key members of the programme team to discuss what we did well and any opportunities for improvement on future assignments.

Notice period

The nature of these projects require that the client department has the ability to terminate a project with minimal notice. The client department or the Authority's termination rights for this project are marked below.

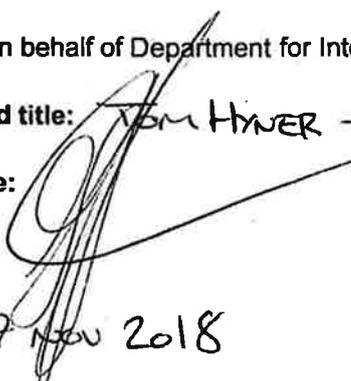
Project Length	Notice period
≤ 3 months	5 Working Days
>3 months, ≤ 6 months	N/A
>6 months, ≤ 9 months	N/A
> 9 months	N/A

Where the client department or Authority terminate a project, we agree that we will be reimbursed for costs incurred to the end of the notice period.

CLIENT DEPARTMENT – COVER NOTE

By signing and returning this cover note, Department for International Trade accepts the contents of the Statement of Work as being the services required and agrees for PA Consulting Ltd to provide the services in accordance with the Statement of Work under "Provision of Cabinet Office Consultancy Support for EU Exit" contract (Ref CCCC18A29) with the Cabinet Office.

For and on behalf of Department for International Trade

Name and title:  Tom Hyner - DEPUTY COMMERCIAL DIRECTOR

Signature:

Date: 27 NOV 2018