



Ordnance Survey
Adanac Drive, Southampton,
United Kingdom, SO16 0AS.
+44 (0)3456 050505 (General enquiries)
+44 (0)2380 056146 (Textphone)
customerservices@os.uk
www.os.uk

Direct No: 02380 055091
E-mail: caroline.eadie@os.uk
Date: 31th July 2017
RFQ Ref: BS0581.2017

Dear Sir/Madam

REQUEST FOR QUOTATION (RFQ) – Strategic Large Account Management and Strategic Selling Training

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 the national mapping agency of Britain 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 can be found on our website: <http://www.os.uk>

This RFQ sets out OS's requirements for the provision for; **Miller Heiman Large Account Management Process (LAMP) and Strategic Selling training**.

BACKGROUND:

- Ordnance Survey is a UK mapping agency commercially driven global, geo-tech, data powerhouse
- This transition is reflected in new leadership, new people, new structure, new competencies and also the changing nature of customers and the relationships with them.
- There is currently a small UK team and a small but growing international team responsible for managing and growing those relationships with global customers.
- OS have the right people in sales, so now requires training to give them the right tools, methodologies and skills to increase their large account management

To support this, OS are requesting services, as specified in Appendix A (Statement of Requirements). If you require any additional information in order to provide the required submission, please submit any questions to the procurement contact above, via the following email address: procurementgroup@os.uk (marked for the attention of the procurement contact), no later than **noon on Friday 4th August 2017** for final receipt of clarification questions. OS reserves the right to issue the response to any clarification request made by you to all participants.

All submissions must be returned no later than **1700 on Friday 11th August**. Please note that OS may reject any submission not received by this date.

OS reserves the right to cease this procurement process at any time without any liability (whether in contract, tort or negligence) to the participant. All OS's technical and commercial information contained within this RFQ must be considered confidential and must not be disclosed to a third party.

OS has no liability for any costs incurred by the participant in preparing or evaluating this quotation. The request and submittal of the quote does not constitute a purchase agreement between OS and the participant. OS reserves the right to amend, add or delete its requirements from this RFQ. This RFQ does not constitute an order or contract offer and there is no obligation for OS to accept your submitted proposal.

All documents and information contained in this RFQ shall remain the property of OS. Participants shall not disclose either: a) the fact that they have been invited to participate in this RFQ or release details of the proposed contract; or b) details of their quotation 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 purposes of preparing the quotation.

Amendments to RFQ

At any time prior to the date for submission of RFQ responses, OS may amend the procurement process or the RFQ. Any such amendment shall be issued to all participants at the same time, and if appropriate to ensure participants have reasonable time in which to take such amendment into account, the date for submission of RFQ's shall, at the discretion of OS, be extended

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

OS is committed to meeting their legal responsibilities under FOIA and EIR. Accordingly, all information submitted to OS (including without limitation, the information contained in the RFQ and the proposals 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 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: 1) clearly define such information as commercially sensitive; 2) explain the potential implications of disclosure of such information; and 3) provide an estimate of the period of time during which the Participant believes that such information will remain commercially sensitive.

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 FOIA or EIR, or must be disclosed in response to a request for information. Blanket labelling of all the content of submissions as 'confidential' is not acceptable.

Participants should also note that the receipt by OS of any material marked 'confidential' or equivalent does not mean that 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.

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. Participants 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. OS reserves the right to disqualify the Participant where the measures taken or proposed do not address the conflict to OS's satisfaction.

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 at Appendix E, that it has not prepared its response in collusion with any third party and will not engage in collusive behaviour during the tender process.

Please do not hesitate to contact me if you have any questions concerning this project; thank you in advance for your support with this project.

Yours sincerely

Caroline

Caroline Eadie

Supplier Relationship Management – Business Services

For and on behalf of **Ordnance Survey Limited**

APPENDIX A – STATEMENT OF REQUIREMENTS

Overall Requirements:

- There is a desire to create a firm commercial platform for growth that is built on world class, stable, scalable methodologies and approaches that enable a more sophisticated approach to relationship management across the organisation.
- It's critical that all the people/ departments involved in these key relationships are managed in a cohesive and strategic way to pull focus the whole organisation into meeting the needs of these critical customers
- Heiman Miller LAMP and Strategic Selling training has already been rolled out across some areas of business OS would like to continue using this approach, and train further members of the business.
- OS requires the same strategic training model in all the relevant business areas

Specific Requirements:

- Focus on management of top, strategically important account relationships
- Provision of clear process for how OS can execute relationship management that is long term, joint, and cross functional to deliver strategic value to the customer and hence ensures retention and growth of these critical accounts.
- A programme that could if necessary be rolled out to not just account managers but also with key people from other parts of the organisation that need to be involved with the customers (e.g. operations, legal, finance, propositions teams) Delivering value for the customer requires that all key stakeholders understand what the nature of the relationship is and what the plans are so that they / their department can fully support it.
- An established best practice opportunity (deal) management methodology that focusses on developing a comprehensive strategy to win new, key opportunities
- An approach that:
 - encompasses goal clarity and definition, pipeline management, stakeholder management, competitive analysis, and action planning.
 - provides a clear process for how to develop winning strategies for major new pieces of business that the strategic account planning process will identify.
- Follow up support/coaching to help embed and deepen people's understanding of the training and help with implementation.
- Blue and Gold paper Miller Heiman 'Capture Plans' are currently being integrated in OS's new CRM system (Microsoft Dynamics)

Deliverables

- Do you have the capability to deliver both Miller Heiman methodologies; Large Account Management (LAMP) and Strategic Selling within the timeframe? and what methods would be used to optimize the benefits?
- The sales / account management teams must have clear methodologies and tools to be help analyse and strategize for success in complex, global relationships, and deals. Please demonstrate how this will achieved, with supporting case studies. Please also supply a customer reference.
- Demonstrate how senior management will have the visibility and clarity into critical commercial activity with consistent detailed data in an easy to consume format?
- Describe how your training will be able to provide and demonstrate best practice and scalable platform for growth?
- The training provider will need to establish metrics by which to measure and track the initiative. For example, this might be:
 - For deal management
 - A higher strike rate
 - An increase in average deal size
 - Faster sales cycle
 - A bigger value pipeline (or funnel)
 - For relationship management
 - Better customer satisfaction scores/ feedback
 - Increased level of engagement (i.e. with more senior managers)
 - Increased breadth of engagement (i.e. with a wider number of stakeholders)More cross selling and upselling opportunities identified (a bigger account specific pipeline)
- OS's Training requirement for Year One are as follows
 - Up to 10 delegates requiring full training*
 - Up to 10 delegates requiring awareness training.

*** This training is required to commence on the 5th September 2017**

- Provide a timetable for Year One's training. Setting out clear milestone to enable all the requirements and deliverables to be met.
- Provide slides and, other visual aids from the courses, of how the trainer successfully delivers the training?

Contract / Term

- The term of the contract will be for 2 years with an option of for 12months extension.

Price

- As the term of the contract is for 2 years (with option to extend for a 12-month extension). The costing will be based on total cost of Year One.
- A full cost breakdown should incorporate the below service requirements, and other additional services that would be beneficial to service OS's requirements

Service	Cost (100 marks)
Discover day – Meet and engage with the OS teams/wider team to fully understand OS. Meet with Senior stakeholder to brief them what their teams will learn/achieve, and how they can assist	
Miller Heiman LAMP training - Full training	
Miller Heiman LAMP training - Awareness training	
Miller Heiman Strategic Selling training – Full training	
Miller Heiman Strategic Selling training – Awareness Training	
Follow Up/Workshops/Coaching – ideally 4 quarterly reviews following the initial training (this will be to meet all the delegates to make sure the approach is embedded)	
T&E expenses (all T&E expenses, must be pre-approved, and align to OS travel policy)	
TOTAL COST	

Delegates numbers will be confirmed when future training is scheduled for Year two. OS and the awarded training provider will be able to keep constancy, work together and ensure the training is embedded successfully.

Location:

- Training/Follow ups will always take place at the OS head offices, Southampton

Timescale

The following dates are for guidance only.

The dates below represent an outline of the planned progress for the procurement, although these dates are for guidance only and are intended to provide Participants with the timeframe which we presently foresee for this procurement. We may change this timetable at any time at our sole discretion.

31/07/17	Brief sent out to training companies
04/08/17 – noon	Closing date for receipt of clarification questions
11/08/17 – 17:00	Closing date for submission of proposals
Wk. com 21/08/17	Contract award decision letter and unsuccessful letter
25/08/17	Contract Award
29/08/17	Contract Award Notice Published
05/09/17	Commencement date of contract
5,/09/2017	Training for year 1 to commence

APPENDIX B - AWARD & SCORING CRITERIA

OS's award criteria for this RFQ is based on making an evaluation of the most economically advantageous tenders (MEAT), based on an assessment of quality, timing, and price. OS will not be bound to accept the lower price quote. Post-negotiation may be entered into, if necessary to qualify or clarify tenders, or to discuss potential improvement or adjustments to the Participant's offer. OS's evaluation team will consist of competent and experienced personnel able to assess and score each aspect of the submissions. A moderation exercise by the team will ensure that scoring is applied on a fair, reasonable and consistent basis.

OS requirements are set out in Appendix A, and has allocated the following marks:

Quality: 200 marks in total are available

Timings: 50 marks in total are available

Price: 100 marks in total are available

1. Quality & Timings

Submissions against the quality, and timings and will be marked in accordance with the Evaluation Matrix, and against the below questions. The 'final evaluated' values will be added together to give the overall score for the evaluation. The bids will be ranked according to the overall scores achieved.

Quality		200
Functional and Technical Merit (Deliverable Criteria)		80
1	Does the participate demonstrate they have fully understood OS's requirements and deliverables, and provided the supporting evidence / case studies	40
2	The sales / account management teams will have clear established Miller Heiman methodologies and tools to: - effectively manage complex relationships with large strategic accounts with a view to delivering strategic value to the customer, hence ensuring retention and growth - focus on developing a comprehensive strategy to win new key opportunities identified by the strategic account planning process - embed and deepen understanding of the methodology Please provide supporting documentation on how this will be achieved through the Miller Heiman training	80
3	Is the Trainer an approved Miller Heiman consultant? Please provide the appropriate credentials / evidence	40
4	Can the Capture Plans be Integrated with our Current CRM – Microsoft Dynamics. Provide examples of previous capture plans (both Blue and Gold), with a background to their requirements	30
5	Are there any additional modules/services to which can support the sales team, within the international arena?	10
Timings		50
1	Does the proposed timeframe meet the requirements of the brief, and the trainer is able to commence on the 5 th September 2017?	50

Submissions against the Statement of Requirements (in Appendix A) for quality & timings will be marked in accordance with the Evaluation Matrix, using the scoring criteria below.

Judgement	Score	Performance
Capable	5	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.
Potential	3	Provides a full response to the requirement/s, however the supporting evidence only partially addresses the requirement; and/or Provides a response to the requirement/s, which raises concerns about the Participant's ability to meet the requirement/s.
Concerns	1	Responds to the requirement/s, however, has only partially addressed the specific issues (if any) identified by OS; and/or Provides insufficient evidence (where applicable) to support its response; and/or Responds to all the requirement/s with insufficient detail raising significant concerns about the Participants ability to meet all the requirement/s; and/or Provides a response which raises significant concerns about the Participants ability to meet the requirement/s.
Inadequate	0	Does not provide a response to the requirement/s; or Responds to the requirement/s, however fails to address the specific issues (if any) identified by OS; or Fails to provide any evidence (where applicable) to support its response.

2. Price

The Price evaluation will be based on the total cost for Year One. In order to compare the prices, the lowest overall price will be given 100 marks. The other scores are calculated as a mark of the lowest price to give a normalised score, i.e. $\text{Individual tenderer's score} = \frac{\text{Lowest Price}}{\text{Individual Tendered Price}} \times 100$. This ensures that all results are comparable on the same basis.

3. Overall Score

The proposal with the highest score, when quality, timings and price are added together will be awarded the contract.

APPENDIX C – TERMS & CONDITIONS

Please note that any order placed, will be under OS's terms and conditions. Although the exact form of the Contract, and minor terms in it, may vary depending on post bid clarification. It must be noted that this contract will not be substantially altered.

[subject to contract]



Contract for Goods and / or Services

This Contract Is entered Into between:

- (1) Ordnance Survey Limited, a company registered in England and Wales (company registration number 09121572) whose registered address is at Explorer House, Adanac Drive, SOUTHAMPTON, UK, SO16 0AS (OS); and
- (2) [Company Name], a company registered in England and Wales (company registration number [insert company registration number] whose [registered office / principal place of business] is at [insert address as on Companies House] (the Supplier).
- (2) [Individual Name] [trading as [insert trading name] of [insert address] (the Supplier). OR
- (2) [Partnership Name LLP] a limited liability partnership registered in England and Wales (registration number [insert registration number]) whose registered office is a [Address] (the Supplier).

This Contract comprises all terms contained in this document (including the Schedules) together with the Purchase Order and any other documents referred to herein.

1 Definitions & Interpretations

1.1 In this Contract the following terms shall, unless the context otherwise requires, have the following meanings:

Expression	Meaning
Acceptance Test(s)	means the test(s) to be carried out by OS in order to verify that the Deliverables and / or the Goods and / or the Services confirm with OS's requirements and this Contract.
Acceptance Testing	means the carrying out of the Acceptance Tests.
Acceptance Test Period	means a period of 10 Working Days commencing on the Working Day following the delivery of the Goods and / or Services.
Agency Worker Regulations	means the <i>Agency Worker Regulations 2010</i> .
Best Industry Practice	means the exercise of the highest degree of skill, care and foresight which would be expected from a highly skilled and experienced person at the leading edge of their field engaged in the same type of undertaking under the same or similar circumstances.
Bribery Act 2010	means the <i>Bribery Act 2010</i> .
Code	means the Secretary of State for Constitutional Affairs' Code of Practice on the discharge of public authorities' functions under Part I of the <i>Freedom of Information Act 2000</i> .
Confidential Information	means any Commercially Sensitive Information and any other information that is marked or identified as confidential, or that would reasonably be considered to be confidential in nature, that relates to the affairs of a Party and is acquired by the other Party in anticipation of or as a result of the Contract.
Commercially Sensitive Information	means any information identified as such in the Schedules.
DPA	means the <i>Data Protection Act 1998</i> .
Data Protection Legislation	means the <i>Data Protection Act 1998</i> and all applicable laws and regulations relating to processing of personal data and privacy, including where applicable the guidance and codes of practice issued by the Information Commissioner.

Contract for Goods and / or Services
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APPENDIX D – COMPANY INFORMATION

Please complete and return the attached Company Information form, this will not be scored as part of the evaluation process but will be held on our records for information purposes. However, if the information contained in this form, highlights any areas of concern about the viability of your organisation, we reserve the right to eliminate any proposals put forward by you.



Company
Information.docx

APPENDIX E Certificate of Non-canvassing and Non-collusion

In recognition of the principle that the essence of selective tendering is that OS shall receive bona fide competitive Tenders from all those tendering.

WE CERTIFY THAT:

- 1 the Tender submitted is a bona fide tender intended to be competitive;
- 2 that we have not nor any person employed by us or acting on our behalf has:

2.1 canvassed or solicited any member, officer or employee of OS in connection with the Tender submitted or the award of the contract; and

2.2 fixed or adjusted the amount of the Tender with any third party (or solicit any third party to fix or adjust their tender); and

2.3 communicated details of our Tender to any third party, other than OS or, where the Tender is submitted on behalf of a consortium, to other consortium members; and

2.4 prevented or dissuaded any third party from tendering; and

2.5 promised, offered, given, requested or accepted any advantage or inducement or consideration directly or indirectly to any third party in connection with the Tender.
- 3 we will not nor any person employed by us or acting on our behalf will at any time undertake any of the acts in paragraph 2 above.

Signature	
On Behalf of	
Name	
Title	
Date	