NHS England Communications Stakeholder Engagement Platforms

DRAFT SPECIFICATION BY SERVICE / PLATFORM

We do not expect every single element listed below to be met, but an indication from Suppliers of what can be provided would be useful.

1. CRM requirements

1.1.1 A CRM system which allows for customisable fields at contact and organisation level, as well as linkages to work, interactions and activities. These customisable fields (at both individual and organisational level) should be reportable and able to be filtered by any admin user account.

1.1.2 Ability to attach notes and attachments to contacts and organisations, as well as to an event listing

1.1.3 The system must be able to hold contact details for up to 500,000 individuals, and be able to link these to other entities / multiple entities as necessary, including for example: individuals to interactions, and engagement activities (e.g. newsletter campaign, event, survey) and work, workstreams, and work programmes, as required (this list of potential linked entities is not exhaustive)

1.1.4 This information must be exportable in a format that can transfer between systems if needed. Again, all linkages with individuals and their related organisations and engagement activities need to be reportable.

1.1.5 The system must support the set-up of organisational and system structures, as well as relationships between contacts. It must allow for the uploading and recording of NHS and non-NHS organisations

1.1.6 Support for case management and enquiries tracking

1.1.7 Ability *at user level* to bulk upload contacts, organisations and interactions. Including ability to link interactions to other entities such as contact and work, workstreams via bulk upload, and share import interactions.

1.1.8 Bulk import logs between users (records of imports so that teams can work together in order to pick up each other's work on or process errors)

1.1.9 Ability to identify and merge duplicate records

1.1.10 Ability to search for contacts and organisations across different fields either individually or using and / or in order to combine fields and entities.

1.1.11 Ability to record marketing and communication preferences. This must include the ability for an individual to opt-out themselves or opt-in from a particular programme / multiple programmes' subscription lists through a linked subscription page with an API protocol.

1.1.12 Ability to add multiple roles/organisations to an individual

1.1.13 Ability for a contact to move organisation without losing associated data

1.1.14 Must contain a database of key contacts with the UK media including regional, broadcast, trade and national media outlets. The service provider must ensure that this is regularly updated

1.1.15 Must contain a database of key contacts within the UK parliamentary system

1.1.16 Ability to assign tasks to colleagues and monitor tasks through the platform

1.1.17 Ability to share views (advanced finds)

1.1.18 The provider must maintain lists of press contacts and parliamentary contacts. If this is not provided, it should be offered as an add on or integrated service

2. Interaction and event tracking/management

2.1.1 Synchronisation between event websites and CRM to capture information.

2.1.2 Ability to create events, allow delegates to register, and to create or update contacts accordingly. This must include in-person, online and hybrid events

2.1.3 Ability to allow delegates to book multiple tickets to the same event, and to book onto additional items including breakout sessions

2.1.4 Need to be able to add/attach information to event listings e.g. agenda, location

2.1.5 Ability to manage and set capacities for an event and individual breakout sessions

2.1.6 Ability to assign tasks to events

2.1.7 Ability to email contacts within the system, ideally using self-created fixed (branded) templates

2.1.8 Ability to set up auto joining instructions to delegates

2.1.9 Capture and ability to report on events including webinars, conferences, training days sessions, etc.

2.1.10 Ability to send and track invitations and registrations as a result of comms activity, and participation/attendance against contacts at events (and also the ability to report on who hasn't registered/attended per ICB/Trust and region so we can understand who we're not engaging with).

2.1.11 Capture and ability to report on Courses run and expressions of interest, enrolments, completion, withdrawal, CPD points awarded against individual contacts

2.1.12 Delegates must be able to add the calendar invites to their diaries in multiple formats e.g. Outlook, Google, iCal

2.1.13 Must be able to tailor the design/brand of the registration 'site/pages'

2.1.14 The platform must be able to be integrated with our corporate website so public events are published on the events pages of our website –e.g. https://www.events.england.nhs.uk

2.1.15 Delegates must be able to reset their account passwords automatically without needing any admin assistance

2.1.16 Must maintain high levels of cross browser compatibility. As a minimum it must support the following client platforms and browsers: Google Chrome, Windows 10, version 1909 or above and Microsoft Edge browser

2.1.17 Ability for events to be set up as either public (appearing on the integrated events page of the NHSE website) or hidden/private

3. Specific criteria for learning and accreditation:

3.1.1 Tracking of students' enrolment and progress in online courses, currently recorded as:

3.1.2 Expression of interest, Registered, Enrolled, Withdrawn.

3.1.3 Recording CPD Points – against individuals' records with an indication / connection to the courses from which the points have been earned

3.1.4 Recording of 'badges' earned by individual students

3.1.5 Completion of pre-and post-course surveys

3.1.6 'Storage' of courses and course bundles to be assigned to contacts (probably using a pick list which links contacts and their organisations to courses and the Improvement Fundamentals programme)

3.1.7 The capture students' areas of interest

3.1.8 Capturing invitation, registration and attendance at learning events (physical and virtual)

4. Mailing

4.1.1 Able to send bulk e-mail directly from the system and track its delivery and subsequent action from the recipient including: Delivery status, open rates, bounce backs, device and click to open rates. This should be visible by overall mailing, and also on an individual subscriber level

4.1.2 The system must allow NHSE to customise and re-use branded templates (including adding graphics) on which to issue press notices, media statements, arrange filming opportunities, campaign newsletters, and event communications

4.1.3 Make every effort not to be blocked by recipients' servers / firewalls/sent to spam i.e. work with our IT team to ensure correct whitelisting protocols are followed (we have found that this is the case when sending communications to Parliamentarians or individual NHS Trusts) for example)
4.1.4 Be able to embed documents we are sending within links rather than as attachments, so there is no issue with attachment size limits
4.1.5 Allow automated email distribution of web content alerts (e.g. through RSS feeds) to recipients based on their preferences (e.g. email alert about new blog about user centred design or new operational update for GP practice managers)
4.1.6 Allow recipients to choose the frequency of automatic web content alerts
4.1.7 Allow recipients to manage their web content alerts (i.e. to see what they are subscribed to, what they can subscribe to and to change their preferences)
4.1.8 The ability to build segmentation within lists. Deliver custom messages based on demographics, location, job role, organisation type (e.g. ICB/Trust) etc and to break down reporting and metrics by segments
4.1.9 A/B testing of bulk email messages
4.1.10 Ability to build responsive email campaigns (e.g. asking for response from subscribers and narrowing focus to those who have not responded later in the campaigns) and manage campaigns flexibly
4.1.11 If the system cannot act as a mailing function, it should offer APIs between systems (without additional cost) to ensure our mailing data remains accurate
4.1.12 Integration of bulk email messaging with social media and text messaging
4.1.13 Simple drag and drop text builder, with ability to edit HTML if needed
4.1.14 Ability to create simple, easy to use branded templates
4.1.15 Ability to attach documents as hyperlinks to emails

5. Reporting

5.1.1 Users need to be able to create and edit own advanced finds / views, dashboards, maps and graphs. These reports and dashboards should have the ability to be created over several fields, including (but not limited to) region, programme, or organisation.
5.1.2 The system should enable connections and the associated activities to be visible at a single view and for this to be able to be filtered down by other fields such as ICB, Region, CCG etc. Etc.
5.1.3 Reports and dashboards should be capable of showing all fields that exist within entities and enable fields from combinations of entities to display alongside each other as the maximum capability of the system will allow
5.1.4 Reports should give the ability to see connections with stakeholder and activity summaries, as well as the ability to filter by role, region, programme, organisation, or other customisable fields
5.1.5 Ability to create groups and reports based on customisable fields, including drop down lists and free text sections
5.1.6 Ability to export groups and reports
5.1.7 Any development work done by a supplier needs to have all fields visible if data is utilised by third party programmes such as Power BI or tableaux
5.1.8 Searches / Views need to be able to be saved, shared and be capable of being duplicated (save as) so that once criteria are set, views will refresh automatically
5.1.9 Ability for different reporting types, including maps, dashboards, spreadsheets etc
5.1.10 Capture and ability to report on business activity tasks, appointments, calls made, events attended, campaign information, responses to surveys and for these to be added too easily by system administrators / modifiers (without requiring a development resource)
5.1.11 Ability to track individuals CPD accreditations via courses enrolment
5.1.12 Ability to produce de-duped lists of contacts or orgs based on search criteria directly from the CRM system – e.g. if looking for all contacts or associated organisations who have completed any course –

need to be able to have the option of getting a de-duped list of contacts and orgs that may have been related to multiple courses, as well as being able to output lists of multiple courses with contacts / orgs against them

6. Surveys

6.1.1 Detailed surveying tool, which can directly link to contacts/organisations/interactions. For example, the ability to select a sample from the CRM based on specific criteria stored within it (e.g. by organisation type, specific roles, recent attendance at a particular meeting, pervious responses to other surveys done through CRM) and distribute to these people

6.1.2 Ability to track response to survey and send follow up reminders to those who have not responded etc

6.1.3 Ability to create and share custom surveys with multiple question formats and survey logic to shape which questions are asked based on sample data or answers to previous questions

6.1.4 Ability to create detailed reports (ideally in different formats e.g. excel, word doc showing summary charts/graphs, PDF) from responses and to export raw data in CSV and other format

6.1.5 If this isn't possible, ideally the new system would connect to Citizen Space so it could receive registrations automatically and be uploaded directly, rather than a manual download from Citizen Space and upload onto the CRM as we currently need to do

6.1.6 It would also be desirable for the system to integrate with more sophisticated survey tools such as Qualtrics (NB: this system is not currently used widely at NHSE, it's been included here as an example of a more advanced survey system)

6.1.7 Whilst not essential, we would be interested to understand if the system can support or integrate with other forms of research and insight activity (for example ability to run discussions, communities etc.)

7. Technical requirements

7.1.1 API Protocol to facilitate regular updates in relation to SIPS / ODS and organisational updates

7.1.2 Ability to create different user profiles with varying access levels, including organisation administrators, local administrators, users. This must include different functionality across these user profiles

7.1.3 Ability to toggle visibility of fields

7.1.4 Ability to track edits, mailings, event creation, report creation based on team member

7.1.5 Onboarding and ongoing training provided by supplier at the request of NHS England

7.1.6 As NHS England runs a 24hr press office, the provider must be able to deliver out of hours IT support including troubleshooting and password resets

7.1.7 Full compliance with GDPR – current security standards – 2FA etc

7.1.8 Initial package of Training support (hours to be provided) and ongoing support and documentation to ensure the most effective use of the system