Knowledge Transfer Network

Events Management Software and Tools

Invitation to Tender
Statement of Works
KTN-ITT A0287-01

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Table of Contents

1. Background

KTN is inviting tenders from specialist events software providers who support the following requirements. KTN have identified a need for organisers, speakers, exhibitors, sponsors and delegates in particular, to experience an improved user journey from registration through to post-event experience.

KTN is the UK's innovation network. It accelerates exploitation of knowledge and invention by facilitating collaboration: delivering economic growth and lasting UK competitive advantage. Our network connects people in order to accelerate innovation across the UK.

One of the key tools for making these connections is events. KTN produce over 400 events each year, both independently and on behalf of Innovate UK (who provide grant funding to KTN) and other partners.

These events take place across the UK and are all business to business. They typically take place for between half a day and a full day, attracting between 50 and 200 delegates to each. The majority of these events are free to attend. However, there is an increasing drive to produce paid-for events which range in price between £25 and £300 per ticket.

A full listing of KTN events can be found here: https://ktn-uk.co.uk/events

KTN currently uses Eventbrite as a registration tool for delegates. Delegate management post-registration is typically managed in-house by Events Managers and Communications Teams using systems including Excel, Meeting Mojo, Google-sheets etc.

Our objectives for procuring this software are:

- To improve and add value to the delegate experience
- To improve and add value to the speaker, exhibitor and sponsor experience
- To reduce manual delegate and registration management by events team
- To ensure that the wider 'technical' team within the KTN and external stakeholders have real time knowledge of event management progress and registrations

2. Services Required

KTN are sourcing companies who can provide a solution which satisfies the majority of our requirements, for event registration and event management.

Please note – not all requirements are essential. KTN are looking for the best tool to use within an active, fluid and ever-changing B2B event environment. It is more important that the tool(s) is intuitive, effective and efficient than offering a multitude of features.

3. Deliverables

Annex 1 contains a list of tabulated requirements. Instructions on how to submit your responses are contained in Annex 1. Please note that not all requirements listed are essential, but will allow us to build a "complete" solution tailored to the needs of KTN Limited

There are some requirements we have which are critical for us in terms of our data and security, which are not open for discussion and are listed below:

- Integration with KTN CRM system (Workbooks) through an open API
- GDPR compliant
- Use of the system on Macs and other Apple devices commonplace (evidence to support this will be required)
- Developers based in a workable time zone with the UK
- 24/7 account management and support available
- Automated and customisable reporting to demonstrate ROI

Please indicate on your submission that your product(s) meet all of our critical requirements.

4. Quote for Services – Fees

KTN requires quotes for the above services, to include time, travel and expenses relating to initial pitch meeting in London and follow up design and progress meetings in Edinburgh and/or London.

Budget is up to £180,000 inclusive of VAT for a two-year commitment. Annex 2 contains instructions on how to provide a quote.

We expect the bidders' quotes to vary in how they are constructed. However, where possible, we request that the quote distinguishes between initial set-up costs and ongoing capital and support costs.

Please include ALL associated costs, for example, developer time, implementation costs and training costs.

5. Term and Expiry Date

We expect to implement the new software/tools at the beginning of December 2019.

6. Submission

Please ensure that all of your documents are submitted via email to Stacy Thompson, Head of Events (stacy.thompson@ktn-uk.org) by Friday 15th November. Invitation to pitch for shortlisted suppliers will take place w/c 25th November in London or Edinburgh.

If invited to pitch, KTN will request at least two written references from existing clients.

Please ensure your submission contains:

1. A completed version of Annex 1, submitted in Word format (name this file *Annex 1 – Requirements_supplier name)*
2. A completed version of Annex 2, submitted in Excel format (name this file *Annex 2 – Pricing_supplier name*)
3. A confirmation that the offer will satisfy the critical items in section 3
4. Supplementary bidder documentation in Word, Excel or PDF format.

7. Main Contact for the Invitation to Tender

Please direct any questions or communications on this Invitation to Tender to:
Stacy Thompson
Head of Events at Knowledge Transfer Network
stacy.thompson@ktn-uk.org

8. Terms and Conditions

Any contract offered will be subject to "KTN's Terms and Conditions of Contractor Engagement – Company Edition", which are provided separately.

Please note that KTN reserves the right to not select any supplier if we feel none meet our requirements and budget.

Annex 1 – Requirements *(example list)*

This table shows an *example* list of requirements against which the bidders should write their response. A separate Word template document will be provided, with the full set of requirements, and bidders should write their response into this template.

Along with the response to each requirement, the bidder should complete column three with only: Yes, No, Partial, Develop or N/A

Yes – the bidder is fully compliant with this requirement
No – the bidder does not support this requirement
Partial – the bidder partially supports the requirement and a further explanation can be input to the notes in the final column.
Develop – this requirement is in development or that the bidder is willing to develop this. Further explanation can be input to the notes in the final column.
N/A – this is an information question that does not require any of the above responses

In addition to this template, bidders are free to submit supplementary information to support their response.

Please do not add any rows/columns to the body of the table. If you need to add extra information add extra rows at the end of the table and highlight in a different colour.

Item No.	Requirements	Yes, No, Partial, Develop or N/A	Supplier Response
A	**Event Management**		
1	Can the system manage event budgets?		
2	Can a suite of templates be set up with an event schedule builder/custom text and images?		
3	Does the system have a photo gallery where all of our images/logos can be uploaded?		
4	Individual task management		
5	Checklists and worksheets for event management?		
6	Venue booking and management?		
7	Contract management and electronic signatures?		
8	Hosting files e.g. venue contracts, invoices, delegate reports etc?		
9	Online collaboration with other users, e.g. task management, calendar coordination?		

Annex 2 – Pricing

In order to compare and contrast offers, bidders are required to supply some pricing information into our template (shown below). A separate Excel template will be supplied, and bidders should submit the pricing information directly into the spreadsheet.

We've provided space for an explanation of the quote. However, bidders may also supply supplementary information to support their bids.

Metrics have been provided to enable a quote to be made. However, if your bid is based on another metric please let us know ASAP and we will endeavour to provide that metric.

Bidders should submit a quote for 2 years, with the first year comprising of only one quarter. We require quotes broken down in this format in order to line-up with the timing of our funding.

TOTAL for 2 years	Year 1 - set-up costs	Yearly capital costs	Yearly support costs	Other - specify	
£0.00	£0.00	£0.00	£0.00	£0.00	*Explanation of costs if necessary*
Features	Y1 - set-up	Yearly capex	Yearly support	Other	
1 *E.g. registration licence*	£0	£0	£0	£0	
2	£0	£0	£0	£0	
3	£0	£0	£0	£0	
4	£0	£0	£0	£0	
5	£0	£0	£0	£0	
6	£0	£0	£0	£0	
7	£0	£0	£0	£0	
8	£0	£0	£0	£0	
9	£0	£0	£0	£0	
10	£0	£0	£0	£0	
11	£0	£0	£0	£0	
12	£0	£0	£0	£0	
13	£0	£0	£0	£0	

Metrics			
	Yr 1 - Q4 19/20	Yr 2 - Q1-4 20/21	
No of Events	113	450	*Total number of events*
Events with pitches	75	300	*Events where speaker pitches have to be stitched together*
No of registrations	7500	30000	*Does not include duplicates*
No. of logins	10	10	*Number of team members who require access*
1 to 1 meetings	19	75	*Number of events where delegate 1-2-1 meetings are required*