

**NHS Choices eCRM / email marketing platform specification requirements**

**HCON00636**

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### Introduction

### The Health and Social Care Information Centre

### The Health and Social Care Information Centre (HSCIC) was created as an Executive Non Departmental Public Body (ENDP) on the 1st April 2013, from NHS Connecting for Health (NHS CFH), NHS Information Centre (NHS IC), Strategic Health Authorities (SHA), and other NHS bodies.

The HSCIC provide a range of technology and information services, employ over 2,400 staff, based across 19 locations in England, oversee an annual budget of £210M and manage approximately £1 billion of taxpayers’ money

Our statutory duties include:

* Designing, delivering and managing any programme or technical service for the health and care system, as directed by the Health Secretary or NHS England
* Establishing and operating systems for the collection or analysis of information as directed by the Health Secretary or NHS England
* Collecting, storing and analysing national healthcare, public health and social care data, including personal confidential data
* Custodian of National and Official Statistics for health, public health and social care
* Assessing and assuring the quality of the data we collect
* Publishing a code of practice for the handling of confidential information
* Publishing a register of the collections and the contents of each collection that we manage
* Establishing and publishing a database of quality indicators in England and assessing the extent to which the information we collect meets information standards
* Working with other national bodies to deliver a year on year reduction in administrative burden on the front line

For further information see: <http://www.hscic.gov.uk/>

### NHS Choices - Social and Digital Media Team

NHS Choices (www.nhs.uk) was launched in 2007 and is the official website of the National Health Service in England. With over 48 million visitors per month, we have become the UK’s biggest health website accounting for a quarter of health-related web traffic. We strive to be a world-leading, multi-channel service for everyone engaging with the NHS and social care.

The Social and Digital Media Team at NHS Choices create and manage social and digital media strategy and campaigns. This includes managing products such as the NHS Choices Twitter and Facebook accounts, as well as implementing digital media campaigns such as Change4Life, Start4Life and wider Public Health England campaigns such as Stoptober and Dry January. The team also manage NHS Choices’ eCRM campaigns, which includes managing the relationship of the external fulfilment platform, within which we send around 250,000 emails per month. These campaigns include the monthly Your Health newsletter, [the Dementia Information Service](http://www.nhs.uk/conditions/dementia-guide/pages/dementia-information-service.aspx) and our [12-Week NHS Weight Loss Guide](http://www.nhs.uk/Livewell/weight-loss-guide/Pages/sign-up-for-weight-loss-email-support.aspx).

Team location: 5C Skipton House, 80 London Road, London SE1 6LH

### Aspirations

As part of our wider strategy, the Social and Digital Media Team are committed to significantly improving our eCRM offering.

In the short to medium term of 3 months – 1 year, the Social and Digital Media Team are expecting to develop our existing campaigns, and launch new products as a result of platform change.

There is also a desire to the joining up of eCRM campaigns to the wider NHS Choices platform, which may include integrating large existing databases with any new email marketing platform.

During 2016 the Social and Digital Media Team want to be in a position where we are confident to facilitate eCRM work for major campaigns on behalf of Public Health England and NHS England and therefore we require a platform that is intuitive to use and offers us the tools to achieve the best conversion rates possible.

### Out of Scope

There is no requirement for copywriting, graphic design, or in-depth consultancy regarding email marketing strategy - all of these elements are all covered in-house

### Service description

The Social and Digital Media Team require an eCRM/email marketing platform that meets industry standards in terms of functionality and usability, while meeting our requirements from a security and client management perspective.

Access to all of the data and content from the current provider will be available from the Social and Digital Media Team

### Requirements

### Mandatory

* Ability to produce quick and effective email campaigns that reflect current health events using a self-serve process for content creation (across a variety of formats, preferably via a WYSIWYG/drag and drop editor) and customer journey design. The platform should allow for campaigns to be planned and delivered within very short timescales where necessary, specifically with a capability to turn around a project from inception to delivery within 48 hours.
* Automated email campaigns (event-triggered) to be delivered through the platform from user signup through to delivery and reporting
* Ability to provide in-depth reporting and population-level analytics for all activity run via the eCRM service
* Experience with large user databases
* Ability to vary methods of data capture
* Data storage and processing in compliance with all applicable Information Governance legislation, namely:
  + ISO20071 accreditation
  + secure user data transfers (e.g. using sFTP)
* a requirement for all user data not to leave Europe at any time
  + all user data within the platform must be held and processed in Europe
* Provision for a simple data capture process for acquiring new users onto the database, either through a customisable webform or via API
* Ability for the Social and Digital Media Team to manually edit eCRM database as required
* Ability to send and analyse surveys as a standard feature.
* The Social and Digital Media Team will manage who has login details to the various platform profiles to manage access.
* Flexible and responsive to user activity

### Technical

* Ability for the Social and Digital Media Team to tailor sending/automation patterns using a visual flow editor based on individual user activity patterns (e.g. resends)
* Automated “send ability”/spam checking functions
* Automated reporting
* Ability to produce and distribute survey/data capture campaigns
  + Surveys integrated into the body of e-mails
* Clear plan in place for sender reputation management
* Tools to allow for continual optimisation of key metrics, e.g. conversion rates and open rates
* Ability to integrate with web analytics platforms (currently Choices use Webtrends/Google Analytics). A prospective supplier should be able to integrate campaigns with Google Analytics (and other solutions) as a standard procedure when setting up new campaigns. This functionality will need to be a part of the core offering

### Non Functional

* Must be able to send out up-to 5,000,000 emails a month
* System needs to be responsive
* System need to provide for the storage needs
* Customer data residing within the Hosted Environment will be stored using RAID level 1 technology or higher.
* Customer data will be backed up regularly. Backups will be retained for a period of no more than two weeks.
* The provider needs to ensure that Choices mails are not Blacklisted by mail providers
* When an upgrade to an existing service is released, including operating system upgrades, device upgrades, software upgrades and required upgrades; the eCRM provider will work to coordinate these upgrades with preventative maintenance service calls or schedule with Customer to reduce downtime.

### Support

* Account technical/troubleshooting support
* The eCRM provider will be responsible for coordinating all incident isolation, testing and repair work for the Service.
* Customer and the eCRM provider will maintain an escalation process to aid in problem resolution should any outstanding incidents warrant, either because a party has not responded to an incident within the parameters set forth in this agreement, or because an incident has not been resolved within the estimated time of repair. Customer and the eCRM provider will exchange escalation procedures and contact lists. These lists will be routinely maintained, updated, and republished as changes warrant.
* Training
  + Introductory instruction in order to facilitate the setup of our existing products
    - functionality and use of the new tool set
    - updating and checking the user database
  + Follow-up / advanced training to fully understand the functionality of the platform to support continuous improvements

### Performance expectations

* The eCRM provider shall use all reasonable commercial efforts to ensure that Service(s) are operating and available to Customer at a rate of 99.9% uptime.
* Server maintenance and/or upgrades shall be performed as required and will occur after standard business hours at an agreed time.

### Anticipated demand

* Minimum of 250,000 emails per month, with the ability to scale up to at least 5,000,000 per month as required by the demands of individual campaigns at short notice.

### On boarding Timetable – 2 months

### All data and products are migrated to HSCIC from existing provider (templates are currently fixed HTML campaigns, user databases are in industry-standard CSV formats) Migrating of data will be encrypted using SFTP for the secure transfer

### Training - introductory training for 4 persons

### Initial setup of our existing products

### New users onto the database - simple data capture process available through a customisable webform or via API

### Updating and checking the user database

### HSCIC Information Governance assurance completed

### Functionality, usability, security and client management tests undertaken and assured

### User testing to ensure that the products are ready for public consumption

### Integration with Webtrends /Google Analytics confirmed

### Go live

### Follow up /advanced training for 4 persons

### Performance Measurement / Reporting

* Resolution of any minor service issues within agreed SLA[[1]](#footnote-1) ;
* Resolution of major service issues (e.g. platform outages) within 2 hours
* KPIs[[2]](#footnote-2):
  + Delivery rate
  + Hard bounce rate
* Reporting on performance metrics available on a self-serve basis without any limitation on volumes

### Contract Management

* The Social and Digital Media Team will manage the day-today relationship with the platform provider
* To facilitate the aspirations of the Client, a delivery plan will be agreed and reported upon every 2 weeks in line with the planning cycle.
* Account Manager to attend face-to-face meetings with the Client.

### Constraints

A timeframe of two months to prepare for “Go-Live” has been allotted. This is to include all on- boarding and test activities providing assurance that the products are ready for public consumption.

Any risks or constraints to the service being available must be identified and a plan to mitigate risk provided

### Future Development

The development of Choices eCRM will commence in stages, broadly consisting of the following developments:

* Transfer and upgrade of existing NHS Choices email marketing products, namely, Your Health, Dementia Information Service and 12-Week NHS Weight Loss Guide. This would involve upgrading these platforms to involve optimum time sends, behaviour based automations and robust reporting.
* Integration of eCRM with wider NHS Choices database, specifically looking at creation of a single customer view. This may specifically include screening incoming user data for quality and supporting NHS Choices with transcribing user data into a format usable by the eCRM platform.

### Off boarding

* All of the data, content and high level reporting data transferred to HSCIC / The Social and Digital Media Team.
* Written assurance that automated campaigns would not continue, under any circumstances, after the agreed date.
* All data remaining on the supplier’s platform is deleted/ destroyed once HSCIC / The Social and Digital Media Team / NHS Choices had confirmed that they had received everything needed and that the account(s) can be closed.

### Intellectual Property Rights

The Client will own the intellectual property pertaining to content

### Freedom of Information (FOI)

* HSCIC is subject to the requirements of the Freedom of Information Act.
* Suppliers are not required to directly respond to FOI requests for information.

**Appendix A**

**Service Level Agreement (SLA)**

1. **Availability**. The eCRM provider shall use all reasonable commercial efforts to ensure that Service(s) are operating and available to Customer at a rate of 99.9% uptime.
2. **Support and Response Time**. The eCRM provider will provide support for its hosted infrastructure Service(s) twenty-four hours per day, seven days per week, and three hundred and sixty-five days per year (24x7x365).
3. The eCRM provider will respond to support requests within the following targeted time periods:
   * One hour if Service(s) is completely unavailable and affecting all users.
   * Two hours if Service(s) is completely unavailable and affecting some users.
   * Four hours if Service(s) is completely unavailable and affecting one user.
4. **Incident Handling**. The eCRM provider will be responsible for coordinating all incident isolation, testing and repair work for the Service.
5. **Escalation Procedures**. Customer and the eCRM provider will maintain an escalation process to aid in problem resolution should any outstanding incidents warrant, either because a party has not responded to an incident within the parameters set forth in this agreement, or because an incident has not been resolved within the estimated time of repair. Customer and the eCRM provider will exchange escalation procedures and contact lists. These lists will be routinely maintained, updated, and republished as changes warrant.
6. **System Maintenance**. Server maintenance and/or upgrades shall be performed as required and will occur after standard business hours at an agreed time.
7. Data Maintenance, Archival and Backup Procedures. Customer data residing within the Hosted Environment will be stored using RAID level 1 technology or higher. Customer data will be backed up regularly. Backups will be retained for a period of no more than two weeks.
8. **Upgrades to Application Software and Associated Devices.** When an upgrade to an existing service is released, including operating system upgrades, device upgrades, software upgrades and required upgrades; the eCRM provider will work to coordinate these upgrades with preventative maintenance service calls or schedule with Customer to reduce downtime.

1. Realistic targets will be agreed with the provider [↑](#footnote-ref-1)
2. Realistic targets for these will be agreed with the provider [↑](#footnote-ref-2)