# general

All proposals and questions should be sent electronically to [tenders@ukces.org.uk](mailto:tenders@ukces.org.uk) and must arrive by the closing date and time detailed in the Timetable below. Tenders sent by any other method or route will not be accepted. It is the responsibility of the tendering organisation to ensure that their proposal reaches the UK Commission by the deadline date and time, any tenders received late cannot be accepted.

# Background

The UK Commission for Employment and Skills is responsible for maintaining the integrity and delivery of the Investors in People brand. As part of this we licence seven organisations, referred to as Delivery Partners, to deliver Investors in People across the UK and Internationally. Delivery Partners are responsible for delivery of assessment and advisory services relating to the Investors in People framework.

Whilst the Investors in People brand and all customer data is owned by the national team at UKCES, it is our Delivery Partners who are responsible for maintaining customer relationships and therefore validity of customer data that is collected on all of our accredited, and working towards being accredited, customers. The data collected from Delivery Partners is defined by UKCES via a data schema which sets out requirements for each field.

Investors in People launched a new CRM system, built within Microsoft Dynamics 2013, back in October 2013. Phase 1 of this build was to install MS Dynamics and configure CRM so it could take lead information from the Investors in People website and assign these leads to our 7 Delivery Partners based on region. We also installed ‘Click Dimensions’ as an automated marketing platform, using the information within Dynamics, to capture and score leads.

Phase 2 of the build was focused around building integration with our 7 delivery partners, who all use their own systems in order to store account information on whether a client is accredited or working with Investors in People.

Phase 3 of the build brought our Northern Ireland and International Delivery Partners onto using the national CRM rather than using their own systems

The master data for the other five delivery partners sit within our delivery partner systems. Our objective is to ensure that all of the master data is held nationally, with consistent definitions, to simplify reporting and improve the client experience. It is currently a licence requirement for our Delivery Partners to all be on the national CRM from the next relicensing phase in 2017 though we expect some Delivery Partners to move across ahead of this date.

In addition to MS Dynamics 2013, we use a system call SCRIBE which acts as middleware between our CRM and the Delivery Partner systems. SCRIBE also acts as the middleware between the current Investors in People website and the national CRM system.

Over the past 12 months Investors in People has refreshed its core product, the Investors in People framework. In 2015 we will be piloting the new framework. As part of the work on refreshing the framework we have also been working on providing more rigour within our assessment process. The purpose of the piloting phase is to test the both the framework and the assessment process end to end.

This Invitation to Tender (ITT) sets out our requirements for further developing the CRM system, the customer journey, increasing integration with our website and further customising our reporting and management information.

# specification and requirements

Our requirements for phase 4 of the CRM build are focussed around the following:

## Essential

### Customisation of CRM for the new Framework

The Investors in People framework is our core product. All accredited organisations are assessed against the framework and the associated assessment ‘journey’. We are launching the pilot for our redeveloped Investors in People framework in early August 2015. As part of this we have redesigned the customer (assessment) journey and require this to be mapped and built into the National CRM ready for the start of the piloting phase. It is important to note that the both the old framework and the new framework will be operational from August 2015 through to 2017 after which, no organisation can be accredited using the old framework.

1. The new customer journey is an evolution of the current journey. We see the developments as branching off rather than operating as two different customer journeys running in parallel. It is a requirement that both journeys meet each other at the Accreditation stage in order to maintain minimal disruption to reporting requirements.
2. Development carried out within this phase must take into account our objective of moving towards a Centralised CRM. As a result we have 7 end user delivery partners and our supplier will need to work with both IIP National and our Delivery Partners in order to ensure the build is fit for purpose as of the start of the Piloting phase in early August 2015. IIP National will be the primary client and will take the lead in co-ordinating the involvement of Delivery Partners.
3. In order to support the new customer journey from end to end, we will require customisation of the views within CRM. Our aim is to implement a clearly defined process and have CRM workflow direct the Delivery partners through this process when completing the relevant fields at each stage of the journey.
4. As a core part of the new customer journey we require that survey assessment data is linked to data within the CRM. A separate organisation will be working on the survey itself and the data capture process.
5. A full review of our definitions (schema) is required to ensure that the new customer journey is clear for all users and across all systems. We see this as collaboration between IIP National and the chosen supplier.

### Integration between National CRM and IIP Website

As part of the new framework, there is a requirement to pass information to and from our website, [www.investorsinpeople.co.uk](http://www.investorsinpeople.co.uk) . The method of information transfer would be via a web service and the data would be either standard data or documents such as PDF’s and Word documents. Our Website supplier would be responsible for any API creation to provide data from the website and the winner of this tender would be responsible for setting up the interface to bring this into CRM. Conversely, where CRM data is required by the website, the winner of this tender would be responsible for creating the API to present this data to the website and the website provider would be responsible for setting up the interface to bring this into the website

The data to be transferred is as follows

Collection of final assessment reports from the Website into CRM

Once a client has been assessed against the Investors in People framework they receive an assessment report. We require the facility to store the report via some form of document storage. Our requirement is that we have the ability to store this information in the customer/project record. It should be noted that our documents in CRM are stored in a Sharepoint/CRM integration.

Client Benchmarking from the Website into CRM

As part of our new data requirements we will need the ability bring from the website benchmarking information on organisations based on their assessment results contained within the final assessment report. The assessment results are likely to consist of a score of 1 to 4 against 9 indicators along with an overall grading (standard, bronze, silver or gold). We need to be able compare and benchmark the results of different clients using a number of client metrics stored in the CRM which could include company size, sector and location along with others which are still being defined.

Mapping to online assessment survey from the Website into CRM

As part of the new assessment process, we are introducing the use of employee surveys in order to gather benchmarking data and to provide more in depth assessment and analysis of an organisation. The survey will be completed by a number of employees in the client organisation. A separate survey tool is being developed (Based also on SQL and the survey solution for our online assessment process is out of scope for this ITT) but the national CRM will need to integrate with the survey tool as it is developed. We anticipate this will be completed by ensuring that every new survey ‘project’ is mapped to an account unique ID in CRM via a MS Dynamics API. We will be working with a separate organisation on this tool and expect the winning bidder to work closely with this third party supplier to enable this process.

### Customisation of reporting on New Framework

We have sophisticated and growing reporting requirements as part of the launch of the new framework. There are two user groups to be considered regarding reporting:

* IIP Delivery Partners, who should only be able to drill down into the data for their region
* IIP National, who would need to be able to take a whole system view within our MI reports

We currently predominantly use excel for much of our data analysis and management information reporting. The data underlying our reports is a mix of static data which is updated on a quarterly basis and live data from the CRM. We have very recently started to use a system called Qlikview for some reporting related to the current customer journey.

We are currently in the process of mapping our management information requirements for the future and we are interested in either building on progress made with the Qlikview tool to date or exploring other solutions that may be suitable and could be used to report across both journeys.

In addition to producing standardised management information for DP’s and IIP National based on the new Framework, we would also require further drill down of the current journey which will continue to run until 2017.

With regards to Qlikview our preference is to work with an approved provider and so reserve the right to appoint another organisation in order to complete this strand of work alongside the CRM build.

**Support and maintenance of CRM, SCRIBE and Qlikview**

We already have a support and maintenance contract for MS Dynamics 2013 and SCRIBE for 2015 and it is not anticipated that this would change during this period.

## Additional

**Call off Days**

We would like to purchase a number of call off days, which may include but will not be limited to, such elements as CRM best practices and our use of Click Dimensions so that we can get greater value from our investment. As part of your bid please submit a rate card for how much it would cost per day for such work.

**System Support**

##### We currently have a support contract with the incumbent developer which runs to 13 January 2016. We recognise that the most effective solution would be to have support for MS Dynamics 2013, Scribe and Qlikview provided by the development company. Please quote separately for annual support of these elements as an optional extra and supply the appropriate Service Levels that would apply to your quote.

##### 

## Key deliverables/outputs

This phase of development is focused around getting our CRM solution ready to use as of 01 August 2015 to provide a strong user experience in relation to the piloting of the new framework and the associated customer journey. Successful bidders would be responsible for the following outputs:

1. Review and clarification of all definitions to ensure that they are fit for purpose in the refreshed client journey.
2. Customisation of CRM:
   1. Amendment of the customer journey within CRM in accordance to new changes being made as part of the new framework/assessment process and in line with reviewed definitions (1)
   2. Creation of new screens within CRM that take the end user through the process in stages depending on where the organisation is within the customer journey
   3. Creation of new views that support the new customer journey
   4. Creation of additional fields in accordance to new data capture requirements
3. Integration of CRM and the new Online Assessment Survey. The online survey will be held on a separate platform (SQL) and so some work will be needed to be done around integrating the two systems so this information is recorded within the National CRM. We expect to reply on an API and working closely with other external supplier/s will be essential.
4. Design and build of reports that support the new customer journey and allow End Users to produce MI based on their licenced regions and at a combined UK level. Work is underway to map out our MI and reporting requirements but some initial requirements for reporting will be:
   1. Online assessment results - Benchmarking and comparison of different client segments, top 10 orgs etc.
   2. Number of accredited organisations against both the new and old framework
   3. % of clients with Bronze, Silver, Gold levels of accreditation
   4. Further enhancement of reporting on the current customer journey. Examples are numbers of Bronze, Silver, Gold customers and an industry sector breakdown. Other Management Information requirements will be clarified over the coming weeks.

Given the tight timescale for delivery of the development above, can you please indicate how you would approach this and what you would need from us up front in order to bring you up to speed as quickly as possible?

# cONTRACT AND TENDER PERIODS

You agree that the contents of the tender will remain valid for a period of 6 months from the closing date for submission of the tender.

# budget

A budget of between £60,000 and £120,000 is anticipated to cover delivery of all elements of delivery under this opportunity.

# TIMETABLE

The following timetable will apply for this tender

|  |  |
| --- | --- |
| **Activity** | **Planned Completion Date** |
| Invitation to tender (ITT) sent out | 22 May 2015 |
| Closing date for questions on the ITT | Noon, 01 June 2015 |
| Closing date for UK Commission response to questions to be published to suppliers | Noon, 03 June 2015 |
| **Closing date for submission of tenders** | **Noon, 15 June 2015** |
| Shortlisting | 15 & 16 June 2015 |
| Shortlisted tenderers invited for interview | 16 June 2015 |
| Unsuccessful tenderers notified via e-mail | 16 June 2015 |
| UK Commission Panel interviews | 18 June 2015 |
| Award made | 18 June 2015 |
| Unsuccessful interviewees notified by Project Manager | 18 June 2016 |
| Inception meeting | 23 June 2015 |
| **Commencement of delivery** | **23 June 2015** |
| **Completion of delivery** | **31 March 2016** |

In the event that contractual terms cannot be finalised with the Tenderer selected, the UK Commission reserves the right to select an alternative.

##### format of tenders and guidance on content

##### please prepare your tender following the format of sections below.

# TABLE OF CONTENTS

You will produce an index to aid navigation through the tender document. The table of contents will refer to the following sections and sub-sections and the main tender document will address all of the points required below.

# MANAGEMENT SUMMARY

You will produce an overall statement, of approximately 1 page, which concisely brings together all of the key points made throughout the detailed tender documentation.

# Basic details of your organisation

*Please complete this section and include it within your tender.*

|  |  |  |  |
| --- | --- | --- | --- |
| Company Name |  | | |
| Address |  | | |
| Post Code |  | Website |  |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Contact 1 | Contact 2 | Contact 3 |
| Contact Name / Job Title |  |  |  |
| Contact Telephone |  |  |  |
| Contact e-mail |  |  |  |

Please put an ***x*** against one box in each section that most closely describes your organisation.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier Type** | |  | **Company Status** | |
| Sector Skills Council |  | Government Statutory Body |  |
| Standard Setting Body |  | Limited by Guarantee Charity |  |
| Supplier |  | Limited Guarantee Non-charity |  |
| **Company Size** | | Limited Liability Partner |  |
| Small - Up to 50 Employees and less than £5.6m turnover |  | Partnership |  |
| Public Limited Company |  |
| Medium - 51 to 250 Employees and less than £22.8m turnover |  | Private Limited by Shares |  |
| Sole Trader |  |
| Large - Over 250 Employees |  | University |  |

|  |  |  |
| --- | --- | --- |
| **VAT Registration Number** | **Company Registration No.** | **Charity Number** |
|  |  |  |
| **Date of Registration** | **Date of Registration** | **Date of Registration** |
|  |  |  |

Bank Details

|  |  |
| --- | --- |
| Bank Name |  |
| Contact Name |  |
| Branch Address |  |
| Post Code |  |

Ultimate Parent Company (if applicable)

|  |  |  |  |
| --- | --- | --- | --- |
| Name |  | | |
| Address |  | | |
| Post Code |  | Website |  |

# financial and commercial Criteria (Pass or Fail)

*Please complete this section and include it within your tender.*

|  |  |  |  |
| --- | --- | --- | --- |
| How many years have you been trading? | |  | |
| What was your actual turnover in the last 2 financial years? | y/e  turnover | y/e  turnover | |
| What was your actual trading result in the last 2 financial years? (profit/loss) | y/e  profit/loss | y/e  profit/loss | |
| What were your balance sheet total reserves in the last 2 financial years? | y/e  Reserves | y/e  Reserves | |
| If asked would you be able to provide at least one of the following: | | | |
| A copy of your most recent audited accounts. | | | **Yes / No** |
| A statement of your turnover, profit and loss account and cash flow for the current year of trading. | | | **Yes / No** |
| During the last financial year which single organisation or group was your primary customer?  What percentage of your annual turnover did this customer account for? | | | Name:  %: |
| Has your organisation met the terms of its banking facilities and loan agreements (if any) during the past 12 months? | | | **Yes**  **No**  **No such terms** |
| If ”**No**” what were the reasons and what has been done to put things right? | | | |
| Has your organisation met all its obligations to pay its creditors and staff during the past 12 months? | | **Yes / No** | |
| If ”**No**” what were the reasons and what has been done to put things right? | | | |
| Are you currently involved in any legal disputes or are any pending?  Have you had any judgements against you for which reparation, compensation or costs are still outstanding? | | **Yes / No**  **Yes / No** | |
| If ”**Yes**” give brief details – sufficient not to prejudice the legal process. | | | |

Please record the value of insurance cover for current policies where payments are up to date.

|  |  |
| --- | --- |
| Value of Employers Liability insurance cover |  |
| Value of Public Liability insurance cover |  |
| Value of Professional Indemnity insurance cover |  |
| Value of other cover. Please provide details |  |

# MEETING THE SPECIFICATION

You will produce a comprehensive but concise document that demonstrates how you will be able to fulfil the requirements of the specification. In particular, the tender will be evaluated with due regard to the following sub-sections. Please note that the order in which the evaluation criteria are listed does not imply relative importance.

## policies and procedures criteria (5% of the total score)

*Please complete this section and include it within your tender*

|  |  |  |
| --- | --- | --- |
| Criteria |  | Marks available |
| Does your organisation operate health and safety at work systems and procedures? | **Yes / No** | 1 |
| Does your organisation have a written equal opportunities and diversity policy that is communicated to your staff? | **Yes/No** | 1 |
| Does your organisation operate environmental management systems and procedures? | **Yes / No** | 1 |
| Does your organisation operate risk management systems and procedures? | **Yes / No** | 1 |
| Does your organisation hold a recognised quality management certificate for example BS/EN/ISO 9000 or equivalent? If not do you have quality assurance systems or procedures in place? | **Yes / No** | 1 |
| Does your organisation have Investors in People (IiP) accreditation? | **Yes / No** | 3 |
| Does your organisation have a policy on training or workforce development? | **Yes / No** | 1 |
| What is your organisation’s staff turnover? | 0-10%  10-20%  Over 20% | 1 |
| If you have answered “**No**” to any of the above, can you describe for each “**No**” response how you manage your organisation and staff in the absence of the policy, system or procedure? | | |

## capability criteria (65% of the total score)

*The format of your response is at your discretion, but will cover the following.*

|  |  |
| --- | --- |
| **Capability Criteria** | **Available** |
| Understanding of Investors in People’s strategic aspirations for its CRM solution and assessment of the critical success factors – including the role of the SI – in realising these goals. | **15** |
| Proven examples of successful implementation and customisation of MS Dynamics CRM 2013, Click Dimensions, SCRIBE and external solutions allowing for upload of data and documentation including case studies and references. | **20** |
| Experience of implementation of BI solutions, particularly focussed around benchmarking of clients. | **20** |
| Experience of implementing technical solutions linking website data & documents into CRM systems and vice versa | **10** |
| Experience and capability of the named individual(s) who will lead and deliver the project of this tender. This will include details of how they will approach working with other suppliers to deliver an effective solution | **10** |
| Proven relationships with relevant solution / product vendor(s). | **5** |
| Defined and relevant methodology and approach for system review, planning, controlling and delivery of both firm and emerging requirements within the full life of this project. | **20** |

**A minimum score of 65% of the marks available** in the Capability section must be achieved in order for your tender to continue to be considered.

## Price (30% of the total score)

Given your approach as detailed above and the tight timelines for delivery, please give indicative costs & number of days/team members allocated to delivery of each element within the Key Deliverable/Outputs detailed on page 4 of this Invitation to Tender document and include any time required to review the CRM system to get up to speed. Please indicate length of working day.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Activity | Team member | Day rate (ex VAT) | No. of days | Total ex VAT |
| System review and handover from incumbent supplier |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

Optional: 12 month support of MS Dynamics 2013, Scribe and Qlikview, please quote separately including details of the appropriate Service Level.

## references

These references must be external to the UK Commission. Please provide details of three recent contracts that are relevant to the UK Commission’s requirement. Where possible at least one should be from the public sector. If you cannot provide three references, please explain why.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Reference 1 | Reference 2 | Reference 3 |
| Customer Organisation: |  |  |  |
| Customer Contact Name and Phone Number: |  |  |  |
| Date Contract Awarded: |  |  |  |
| Contract reference & brief description: |  |  |  |
| Value: |  |  |  |
| Date contract was completed: |  |  |  |
| Have you had any contracts terminated for poor performance in the last three years, or any contracts where damages have been claimed by the contracting authority?  If **YES** give details – please ensure that the details given do not prejudice any on-going court cases. | | | **Yes / No** |

# DECLARATIONS

*Please complete this section and include it within your tender. Unsigned declarations submitted with tender documents will be regarded as a non-compliant application.*

I acknowledge that the standard contractual terms and conditions of the UK Commission will form the basis of any contract between the parties resulting from this invitation to tender;

##### IMPORTANT YOU MUST COMPLETE THIS SECTION FOR youR APPLICATION TO BE VALID. THIS IS A LEGALly binding DECLARATION.

I declare on my honour that, (any of) the director(s) / officer(s) / partner(s) / proprietor(s) of the organisation, are not currently in, or previously have been in any of the following situations:

* declared bankrupt, been or are being wound up or having any affairs administered by the courts. Entered into an arrangement with creditors, or have suspended business activities. Been or are the subject of proceedings concerning any such matters and in any similar situation arising from a similar procedure provided for in legislation or regulations;
* been convicted of any offence concerning professional judgement by a judgement which has the force of res judicata[[1]](#footnote-1),
* been found guilty of any grave professional misconduct proven by any means which the contracting authority can justify;
* failed to fulfil obligations relating to payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country where established or with those of the country or the contracting authority or those of the country where the contract is to be performed;
* been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity;
* been declared to be in serious breach of contract for failure to comply with contractual obligations.

Any of the events above would exclude us from participating in this procurement

application.

In addition, the undersigned declares on their honour:

* that on the date of submission of the tender, the company or organisation I represent and the staff proposed for this tender are not subject to conflicts of interests in the context of this invitation to tender; I undertake to inform the UK Commission without delay of any change to this situation after the date of submission of the tender.
* that the information provided to the UK Commission within the context of this invitation to tender is accurate, sincere and complete.
* that the amount or appropriate amount of the tender price has not been communicated to any other party, other than in confidence and for the express purpose of obtaining insurances or a bond in connection with this tender;
* the tender has not been fixed nor adjusted in collusion with any interested party;
* the tender will remain valid for 6 months after the closing date of the tender;

|  |  |
| --- | --- |
| Name | Title |
| Signature | Date |

**Notes on the Government’s Transparency Agenda**

From January 2011 the UK Commission will be required by Cabinet Office to publish all contracts issued on ContractsFinder website.

As part of this process we are able to redact (edit for publication) any information in the contract which is considered to be commercially sensitive, e.g. names and telephone numbers of Project Managers. Contracts will normally not be prepared using Day Rate values; however the financial details which form part of Schedule 1 Annex 1 must be shown and cannot be redacted.

Should you be successful in winning this contract and you think that there would be anything in the contract that you feel would be commercially sensitive and you would prefer to be redacted, please state it in the box below. Items stated in the box below will be considered and will not prejudice your bid for this work, but will require adequate justification to support your reasons for redaction.

|  |  |
| --- | --- |
| Commercially Sensitive Item | Justification for Redaction |
|  |  |

|  |  |
| --- | --- |
| Name | Title |
| Signature | Date |

1. res judicata – a matter already settled in court; cannot be raised again. [↑](#footnote-ref-1)