POTENTIAL PROVIDER DEMONSTRATION ASSESSMENT FORM (EVENT 3)

TECHNOLOGY EXPENSE MANAGEMENT (TEM)

REFERENCE NUMBER

RM3802

ATTACHMENT 3a

Potential Provider Demonstration Assessment Form

PLEASE NOTE: Potential Providers are not required to do anything with this form as this will be completed by the negotiators who are present for the demonstration. However Potential Providers should take account of the 7 elements below, for which the Authority will required a demonstration to be completed. As stated in the response guidance provided in the Attachment 3 Award Questionnaire for questions AQA1; AQB5; AQB6 and AQB7, the assessment made by the negotiators with regards to the performance of the system in the demonstrations may have an affect on the scores for these questions.

No.	Subject and the response to AQ question that will be affected.	Statement of Needs (SON) / ITT	The Potential Provider should demonstrate	Score Achieved at Tender 1	Revised Score following Demonstration (if required)	Comments
1	Secure login (**AQB7 Information Security Management Plan**)	SON-10.4	User access shall be via password and shall be tightly managed and Users shall only be allowed to view that information which by merit of their User Access Rights they are entitled to see. How login via password is achieved How User Access Rights are applied and a demonstration of different levels of access			
			Recommended time: **5 mins (2 ½ mins for Questions)**			

2	Dashboard views (**AQB7 Information Security Management Plan, AQB6 Reporting)**)	SON-10.1.2 10.4	Customer and Authority Dashboard views of the following: ● Data from Customers' telecoms/technology Suppliers showing spend, service type, tariff, usage, inventory; ● Data from Customers showing contractual information, staffing details, inventory, hierarchical/cost centre structure; ● Data from other relevant sources, such as: rates for benchmarking, market and other commercial The Service shall allow searching and sorting by multiple fields and must be searchable by all fields. The Service shall provide drill-down dashboards and reports. These shall be configurable in a variety of visual formats (e.g. tabular, graphical, and diagrammatic).			
			Recommended time: **10 mins (5 mins for Questions)**			

| 3 | Customer reporting **(AQB6 Reporting)** | ITT - Annex 4, 1.2, | How opportunities to make savings and optimise estates are detailed to Customers using the reporting functions of the Service. Using the data provided by the Authority (where appropriate) showcase the following reports:

● 001 - Record of savings opportunities and results achieved in a pre-agreed format set by the Authority to include, but not be limited to:
  ○ zero usage (with clear definition); termination of services;
  ○ tariff optimisation against existing contractual options;
  ○ asset redeployment;
  ○ consolidation of invoicing resulting in cost savings; and
  ○ billing error corrections.
● 004 - Identify, track and correct discounts, credits and incorrect tariffing as they occur.
● 007 - Spend breakdown to lowest level of granularity - e.g. by phone number, tariff.
● 012 - Cost allocation based reports.
● 013 - Service type per user (e.g. mobile, fixed line, data connections).
● 014 - Most expensive usage (at telephone level granularity) (as appropriate and number of connections reported agreed with customer). | | | |

			● 015 - Most expensive data spend (to telephone number granularity) (as appropriate and number of connections reported agreed with customer).			
			Recommended time: **35 mins (7 ½ mins of Questions)**			
4	Authority Reporting **(AQB6 Reporting)**	ITT-Annex 4 2.3	How the Authority gains insight into Customer spend and usage and builds trend profiles across sectors using the reporting functions of the Service. Using your own data showcase the following reports: ● F - Record of spend breakdown to lowest level of granularity without divulging personal details - e.g. by tariff. ● I - Record of pending contract expirations per Customer. ● J - Summary report with a range of spend breakdowns by sector e.g. health, local government, education etc			

				Recommended time: 15 mins (7 ½ mins of Questions)			
5	Personal Call Management (inc password controlled access) **(AQA1 Service 3)**	SON-12	How a User would: ● Login to their User bill; ● Identify their personal usage; ● Mark frequently used numbers or Services to simplify future verification.				
				Recommended time: 5 mins (2 ½ mins for Questions)			

| 6 | Inventory

(AQB5 Data Gathering/Retrieval) | SON-10.6.2 | How changes are made to the inventory:
● On an individual basis;
● For multiple records

How an individual user's historic timeline of changes is shown.

Views of the inventory that incorporate multiple technology types (e.g. mobile, fixed line) Services into one centralised view on the Portal. | | | |
| | | | **Recommended time:**
5 mins (2 ½ mins for Questions) | | | |

7	Secure upload and download/ exchange of data **(AQA1 Services 5 Historical Billing Audit, AQB7 Information Security Management Plan)**	SON-10.5.2; 14; 15; 16.	How data will be uploaded, downloaded and exchanged between the Customer and Potential Provider via the Portal in a secure environment. How data for users of Services: 5 historical billing / 6 physical audit and 7 Snapshot will be uploaded, downloaded and exchanged between the Customer and Potential Provider via the Portal in a secure environment.			
			Recommended time: **5 mins (2 ½ mins for Questions)**			