

**Bid Pack**

**Attachment 3 – Statement of Requirements**

Contract Reference: CCSO20A99

 Survey Software

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# PURPOSE

## Crown Commercial Service (CCS) invites offers for the Provision of Survey Software to enable it to conduct internal and external surveys and capture and analyse data from survey responses.

## CCS requires the survey software to integrate and work with its Salesforce Customer Relationship Management (CRM) system and Microsoft Power BI.

# BACKGROUND TO THE CONTRACTING aUTHORITY

## CCS brings together policy, advice and direct buying; providing commercial services to the public sector and saving money for the taxpayer.

## CCS provides professional procurement services to the public sector to enable government authorities to deliver improved value for money in their commercial activities and provide professional support.

## CCS may be referred to as the Authority throughout this document.

# Background to requirement/OVERVIEW of requirement

## CCS uses survey software for the creation of internal and external surveys. External surveys include Net Promoter Score (NPS) surveys to all Crown Commercial Service Customers. The surveys capture the details of customer perceptions of the service provided by CCS.

## CCS currently has an agreement with an existing provider for the provision of survey software which is integrated within its Salesforce CRM system.

## The replacement software survey solution will need to be in place by 26 February 2021, as detailed in Section 7, Key Milestones. This new contract will therefore be required to commence 12 February 2021.

## CCS is therefore inviting offers for replacement survey software going forward. The new agreement will be required to be in place for a period of twelve (12) months, with the option to extend for a further twelve (12) + twelve (12) months (maximum 36 months).

## Further information about Salesforce CRM is available on the Salesforce website at: [www.salesforce.com](http://www.salesforce.com).

# definitions

|  |  |
| --- | --- |
| **Expression or Acronym** | **Definition** |
| CCS | means Crown Commercial Service |
| GDPR | means General Data Protection Regulation |
| KPI | means Key Performance Indicator |
| NPS | means Net Promoter Score |
| Salesforce CRM system | means Salesforce Customer Relationship Management system |

# scope of requirement

## CCS requires the provision of survey software to enable it to conduct internal and external surveys and capture and analyse data from survey responses.

## The current Contract expires on 16 May 2021. This new contract requirement is to procure the software survey solution, inclusive of training and support, as specified in Section 6, The Requirement.

## In order for the replacement software survey solution to be in place by 26 February 2021, as detailed in Section 7, Key Milestones, this new contract will therefore be required to commence on 12 February 2021.

## This Contract will be for a for a twelve month period, with the option to extend for a further twelve + twelve months (1 + 1 + 1. Maximum 36 months).

## CCS’s requirement is inclusive of the following:

### **Survey Software solution**, as detailed at 6.2;

### **Multi-User Access**, as detailed at 6.7;

### **Training**, as detailed at 6.8; and

### **Support**, as detailed at 6.9.

## **Trial of Software at Evaluation Stage**

### Potential Suppliers are advised that as part of the evaluation for this procurement, CCS will require a trial of the software for the duration of the three week evaluation period. This requirement is detailed further below at Section 6 - The Requirement (section 6.10).

### Such trial will be at nil cost to CCS.

# The requirement

## Potential Suppliers must be able to demonstrate that their software solution can provide all elements of the requirements.

## To ensure robustness and viability of Potential Suppliers’ proposals, CCS will be testing functionality of all the following elements in 6.2 and 6.9 during the evaluation software trials:

### **Survey Design:** The Solution must:

#### Allow for surveys to be created with a wide variety of options and templates including mobile and web friendly, with the ability to vary and amend font type and size and question positioning.

#### Ability to create multiple question types, including multiple choice, matrix tables, rating, ranking and free text and use graphics/images.

#### Be able to create surveys using interactive graphics that encourage accurate and consistent survey completion.

#### Allow CCS to have complete control over the branding and look and feel of all surveys and forms, as well as the URLs and email from CCS mailbox addresses. Have the ability to send surveys from CCS mailboxes.

#### The Supplier to design five templates for CCS, e.g. a branded CCS template and a Cabinet Office branded template.

#### Be able to tailor and amend survey templates.

#### Be able to preview questions/pages of surveys to enable review during designing of surveys and before survey is issued.

#### Be able to create surveys with easy skip logic functionality, question conditions and branching

#### Allow question piping.

### **Functionality:** The Solution must be able to:

#### Have the ability to display branding as required.

#### Allow for easy upload of multiple customer contact records.

#### Offer functionality that will allow for surveys to be created and issued outside of the Salesforce CRM system, i.e. customer or supplier surveys.

#### Have the ability to input survey questions into invitation emails.

#### Allow multiple responses (when a survey link is forwarded for completion by a different person).

#### Have the ability to adapt for use on websites e.g. the ability for a survey to ‘pop-up’ on a webpage.

#### Allow CCS’s customers to submit responses via mobile devices/interfaces and web browsers.

#### Mobile devices/interfaces means; mobile phones and tablets.

#### Web browsers means; accessed from a laptop or desktop computer or workstation.

#### Browser compatibility must include Chrome, Firefox, Safari (Mac), Internet Explorer and Microsoft Edge.

#### Be able to store and save partial completion of a customer’s response to enable surveys to be returned to at a later date.

#### Meet government accessibility requirements, as detailed under the Public Sector Bodies (Websites Mobile Applications) (No.2) Accessibility Regulations 2018. Services must achieve Web Content Accessibility Guidelines (WCAG) 2.1 level AA.

##### Government accessibility requirements - <https://www.gov.uk/service-manual/helping-people-to-use-your-service/making-your-service-accessible-an-introduction>

##### Understanding WCAG 2.1 - <https://www.gov.uk/service-manual/helping-people-to-use-your-service/understanding-wcag>

##### WCAG 2.1 (further detail) - <https://www.w3.org/TR/WCAG21/>

#### Confirm where the solution does not meet the accessibility requirements, in order to allow for appropriate alternative measures to be put in place. For example, this will include providing detail on which survey authoring choices are not compatible with the regulations.

### **Integration:** The Solution must be able to:

#### Be integrated with CCS’s Salesforce CRM system by using customers email address, contact name and other contact information to match returned responses.

#### Supplier to work closely with CCS’ Digital Services Directorate to integrate current three synchronised surveys with Salesforce and provide ongoing support to integrate future surveys.

#### All responses to be fed back in real time, to enable CCS to view any data at any given time.

#### Pre-populate surveys with data from Salesforce CRM system as required.

#### Both automatically and or manually trigger surveys based on multiple interactions for any action, report or workflow within Salesforce CRM system or other CCS systems, i.e. on delivery of a service or closure of an enquiry.

#### Provide an email replay server that is DMARC compliant. The successful supplier must send the DKIM and SPF keys to CCS to avoid email being rejected.

#### Be able to pull data back from Salesforce CRM system into Survey tool, i.e. case number, and push survey responses back to Salesforce CRM customer records.

#### Allow CCS to monitor the integration transactions back into Salesforce for successes and failures, with narrative on errors to understand why it failed, and the ability to replay transactions on demand.

#### Create and issue real time email alerts for specific responses, i.e. low scoring surveys, to any email address.

#### Provide the ability to issue reminders to integrated/automated surveys, not just ad/hoc or manual surveys.

#### Provide the ability to transfer and store existing survey data from the previous supplier and to future suppliers.

#### Provide APIs to integrate with both Microsoft Power BI and Salesforce CRM system.

### **Reporting:** The Solution must enable CCS to:

#### View the necessary data at any given time. All responses to be fed back in real time.

#### Produce reports, charts and dashboards on the data collected through customer responses, with export functionality.

#### Be able to create and tailor our own dashboards and reports within the platform and not rely on Salesforce CRM system.

#### Be able to identify survey response rates, drop outs, bounce backs and abandonment points.

#### Be able to review response rates on a dashboard, e.g. how many surveys sent, viewed and responded as a graphic.

#### Be able to analyse by individual response and by individual survey question.

#### Undertake automated text analytics including key word, sentiment and topic analysis. Including the ability to pick out themes based on both quantitative and qualitative responses by survey type.

#### Analyse and export data into a variety of formats including PDF, Excel/CSV and PowerPoint.

#### For PowerPoint, this means the ability to export charts and narrative into a slide deck that can be used to present back summary findings.

#### Be able to schedule reports.

#### Be able to provide access to reports and survey response for customers via a sharing link.

#### The survey software must have the ability to provide detailed text analytics, i.e. the ability to identify key word searches and analysis from narrative text responses.

### For example: if thirty responses are received with free text responses, and twenty of these contain the word ‘Communications’, this could highlight that this was an issue referenced by the majority of respondents.

## The survey software must have the ability to transfer existing survey data from a previous Provider. Potential Suppliers are required to provide evidence of their solution’s ability to achieve this.

## Server Access: Potential Suppliers are required to note that CCS uses a Cloud based approach so no access to their servers will be possible throughout both the integration stage and the contract duration.

## The survey software must store customer data onshore (UK data centre). Potential Suppliers must provide evidence of their data storage arrangements.

## The survey software must support GDPR compliance. Potential Suppliers must agree to comply with GDPR legislation.

## **User Access**

### The solution will need to be available as a multi-user licence which can be allocated to specific users within CCS. CCS will need to be able to reallocate licences, as required, over the term of the subscription at no extra cost.

### As a minimum, CCS requires ten CCS users to be able to access the product at the same time. A CCS user would be a person creating and managing surveys on behalf of the organisation. There are no maximum user caps to specify.

### Provide access for all users to be able to view all surveys created in all accounts.

### Provide multiple user admins to manage survey access to the other users. Admins to have access to all surveys.

## **Training**

### The Potential Provider is required to provide training on the survey software to CCS.

#### CCS will require the ten users to have access to the training.

#### The training will need to be provided at the CCS Norwich office or online as required.

#### The training will need to be provided within one week of the contract award.

## **Support**

### The Supplier should offer support during the initial set up activity and throughout the course of the Contract. The Supplier is asked to confirm the set up period required.

### Support during the entire contract term must include a minimum of:

#### Telephone support

### 8am - 6pm, Monday to Friday, excluding Public Holidays.

#### Internet Support (via Email/Live Chat).

### 8am - 6pm Monday to Friday, excluding Public Holidays.

#### Support within the product

### As a minimum, CCS require in product help and access to the Potential Supplier’s FAQs and website.

### Potential Suppliers are asked to detail the support available within the product within their tender submissions.

### Any downtime, either scheduled or unexpected should be communicated to CCS within one hour via email to designated licence users with updates every two hours with indications on when service availability will be reinstated.

## **Trial of Software at Evaluation Stage**

### As part of the evaluation process, CCS requires a trial of the Supplier’s software, to ensure the solution meets the requirements set out.

### The software trial is a mandatory requirement; bids will be deemed non-compliant if they are not able to provide trial access to their software.

### Potential Suppliers are required, in their bid submission, to provide CCS with the appropriate access (such as log-in details or key-code) and instructions to enable access to the software.

### Access to the trial software will be required for a three week period during the evaluation stage.

# key milestones and Deliverables

## The Potential Provider should note the following project milestones that CCS will measure the quality of delivery against:

## The following Contract milestones/deliverables shall apply:

|  |  |  |
| --- | --- | --- |
| **Milestone/Deliverable** | **Description** | **Timeframe or Delivery Date** |
| 1 | Survey Software to be accessible to CCS on the day of contract commencement. | On Contract commencement date (12 February 2021) |
| 2 | The multi user licence/user licences will begin on the day of the contract commencement. | On Contract commencement date (12 February 2021) |
| 3 | CCS to receive training on the survey software. | Within 1 week of Contract Commencement |
| 4 | Successful Provider to commence working with CCS to integrate the survey software. | On Contract Commencement Date (12 February 2021) |
| 5 | Successful provider will have achieved successful Integration of the survey software within the Salesforce CRM system, on both live and production servers. | Within 2 weeks of Contract Award – i.e. by 26 February 2021 |
| 6 | Support during the entire contract term. | Throughout the duration of the contract |

#

# volumes

## CCS require the survey software to allow for a minimum of:

### Unlimited surveys to be created.

### 250,000 survey requests issued, 150,000 through the Supplier, 100,000 through Salesforce CRM system, per 12 months.

### Up to a one million survey responses to be received and stored.

### These figures at 8.1.1, 8.1.2 & 8.1.3 are indicative and based on current volumes, but the expectation going forward is that these numbers may increase by a maximum of 25%.

# continuous improvement

## The Provider should use six (6) monthly contract review meetings to inform CCS of any planned or scheduled improvements to their products or services. The appointed Provider’s attendance at review meetings/other meetings will be at nil cost to CCS. These meetings do not need to be face to face, a conference call will suffice.

## The Provider will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.

## The Provider should present proposed new ways of working to CCS during six-monthly Contract review meetings.

## Changes to the way in which the Services are to be delivered must be brought to CCS’s attention and agreed prior to any changes being implemented.

# PRICE

## Price to include full service offering as specified, including any required training.

## Prices are to be submitted via the e-Sourcing Suite.

# STAFF AND CUSTOMER SERVICE

## CCS requires the Potential Provider to provide a sufficient level of resource throughout the duration of the Provision of Survey Software Contract in order to consistently deliver a quality service to all Parties.

## Potential Provider’s staff assigned to the Provision of Survey Software Contract shall have the relevant qualifications and experience to deliver the Contract to the required standard.

## The Supplier shall ensure that staff understand CCS’s vision and objectives and will provide excellent customer service to CCS throughout the duration of the Contract.

# service levels and performance

## CCS will measure the quality of the Supplier’s delivery by:

|  |  |  |  |
| --- | --- | --- | --- |
| **KPI/SLA** | **Service Area** | **KPI/SLA description** | **Target** |
| 1 | Delivery timescales - Training | The ability to achieve the required key milestones which include:Training on the survey software to CCS staff within one week of contract award. | 100% |
| 2 | Delivery timescales -Software Integration  | The ability to integrate the survey software within the Salesforce CRM system, on both live and production servers within two weeks of contract award. CCS uses a Cloud based approach so no access to servers will be possible. | 100% |
| 3 | Service Delivery | The ability to provide **telephone and internet (via email/chat) support** to CCS between the hours of 8am to 6pm, Monday to Fridays, excluding public holidays as a minimum. | 100% |
| 4 | Service Delivery | The ability to notify CCS of any downtime, either scheduled or unexpected should be communicated to CCS within one hour via email to designated licence users, with updates every two hours with indications on when service availability will be reinstated. | 100% |

## Where the Provider fails the above KPIs, CCS will, in the first instance, seek a mutually agreeable solution with the Supplier. However, if this is not possible, CCS reserves the right to cancel the agreement and seek alternative supply from the next ranked Potential Supplier identified during the procurement event.

# Security and CONFIDENTIALITY requirements

## The Potential Supplier will only be providing access to their survey product so will have no day to day requirement to visit CCS’s premises. When a meeting is required then staff will be supervised by CCS personnel at all times. Meetings are likely to be via conference call.

## The service provider shall have a clear incident response and patching system in place to remedy any publicly reported issues in their service.

## The service provider shall notify CCS of any data breaches that occur involving CCS data and provide assurances of remediation.

## The service provider shall ensure data will be adequately protected as it transits between CCS and the Service Supplier solution.

## The service provider shall ensure that the service supports adequate authentication and authorisation of individuals for varying privileges and roles (i.e. privileged, support and end users).

## The service provider shall support 2FA/multi-factor authentication on at least the high privileged accounts.

## The service provider shall take all reasonable measures necessary to ensure that all CCS data is backed up, as a minimum on a 24 hourly basis, and recoverable within period which is agreed with CCS.

## The service provider shall ensure that service supports adequate authentication and authorisation of individuals for varying privileges and roles (i.e. privileged, support and end users).

## The service provider’s service shall support encryption at rest for all CCS data considered highly sensitive (e.g. PII, commercially sensitive).

## The service provider shall make useful security logs (e.g. login, administrator actions) available to CCS as part of the service. Where this is not possible, the service provider shall maintain such logs and have a mechanism in place to provide details of such logs upon request (e.g. during security investigations).

## The service provider shall undertake an independent penetration test or IT Health Check of its SaaS application regularly (ideally annually) and implement appropriate mitigation for all critical or high issues.

## The service provider shall take responsibility for ensuring that its suppliers/vendors supporting this service maintain a comparable level of security as per these requirements.

## The service provider shall adhere to agreed retention timeframes with CCS and must utilise approved mechanisms for secure deletion of data due for deletion.

## Potential Suppliers are required to demonstrate that their solution meets the required standards of ISO 27001:2013 for personal, procedural, policy, data and technical security.

## Potential Suppliers are also required to be Cyber Essentials Plus certified under the Cyber Essentials Scheme.

## Details can be found here: <https://www.ncsc.gov.uk/cyberessentials/overview>

## The survey software must support GDPR compliance. Potential Suppliers must agree to comply with GDPR legislation. (As per 6.6 of Section 6).

# intellectual property rights (IPR)

## All data collected through the use of the product shall remain the property of CCS and will under no circumstances be used by the Supplier.

## The Supplier is able to retain IPR on the design solution, as this is not a bespoke requirement.

# payment AND INVOICING

## Payment will be made annually on submission of an invoice. Invoices must display a relevant purchase order number.

## Payment can only be made following satisfactory delivery of pre-agreed certified products and deliverables.

## Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.

## Invoices should be submitted electronically to Lucy Bruce at the address below: lucy.bruce@crowncommercial.gov.uk

# CONTRACT MANAGEMENT

## The Supplier should use six monthly contract review meetings to inform CCS of any planned or scheduled improvements to their products or services. The appointed Supplier’s attendance at review meetings/other meetings will be at nil cost to CCS. These meetings do not need to be face to face, a conference call will suffice.

## The Supplier will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.

## The Supplier should present proposed new ways of working to CCS during six-monthly Contract review meetings.

## Changes to the way in which the Services are to be delivered must be brought to CCS’s attention and agreed prior to any changes being implemented.

# Location

## The location of the Services will be carried out at

Crown Commercial Service

 Rosebery Court

 St Andrews Business Park

 Norwich

## NR7 0HS