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**1. PURPOSE**

- 1.1 Crown Commercial Service (CCS) is looking to invite offers for the Provision of Survey Software to enable them to conduct internal and external surveys and capture and analyse data from survey responses.
- 1.2 Crown Commercial Service (CCS) require the survey software to integrate and work with their Salesforce Customer Relationship Management (CRM) system.
- 1.3 Crown Commercial Service (CCS) may be referred to as the Authority throughout this document.

**2. BACKGROUND TO THE CONTRACTING AUTHORITY**

- 2.1 Crown Commercial Service (CCS) brings together policy, advice and direct buying; providing commercial services to the public sector and saving money for the taxpayer.
- 2.2 Crown Commercial Service (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.

**3. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT**

- 3.1 The Authority 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.
- 3.2 The Authority currently has an agreement with a Provider for the provision of survey software which is integrated within their Salesforce CRM system.
- 3.3 The replacement software survey solution will need to be in place by 15<sup>th</sup> June 2018, as detailed in Section 7, Key Milestones. This new contract will therefore be required to commence 1<sup>st</sup> June 2018.
- 3.4 The Authority 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).
- 3.5 Further information about Salesforce CRM is available on the Salesforce website at: [www.salesforce.com](http://www.salesforce.com).

**4. DEFINITIONS**

Expression or Acronym	Definition
CCS	Means Crown Commercial Service
GDPR	Means General Data Protection Regulation
KPI	Key Performance Indicator
NPS	Means Net Promoter Score
Salesforce CRM system.	Means Salesforce Customer Relationship Management system
The Authority	Means Crown Commercial Service (CCS)



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## 5. SCOPE OF REQUIREMENT

- 5.1 The Authority requires the provision of survey software to enable it to conduct internal and external surveys and capture and analyse data from survey responses.
- 5.2 The current Contract expires on the 15<sup>th</sup> June 2018. This new contract requirement is to procure the software survey solution, inclusive of training and support, as specified in Section 6, The Requirement.
- 5.3 In order for the replacement software survey solution to be in place by 15<sup>th</sup> June 2018, as detailed in Section 7, Key Milestones, this new contract will therefore be required to commence 1<sup>st</sup> June 2018.
- 5.4 This Contract will be for a for a twelve (12) month period, with the option to extend for a further twelve (12) + twelve (12) months (maximum 36 months).
- 5.5 The Authority's requirement is inclusive of the following:
- 5.5.1 **Survey Software solution**, as detailed at 6.2;
  - 5.5.2 **Multi-User Access**, as detailed at 6.7;
  - 5.5.3 **Training**, as detailed at 6.8; and
  - 5.5.4 **Support**, as detailed at 6.9.
- 5.6 **Trial of Software at Evaluation Stage**
- 5.6.1 Potential Providers are advised that as part of the evaluation for this procurement, the Authority will require a trial of the software for the duration of the three (3) week evaluation period. This requirement is detailed further at Section 6 - The Requirement.

## 6. THE REQUIREMENT

- 6.1 Potential Providers must be able to demonstrate that their software solution can provide all elements of the requirements.
- 6.2 To ensure robustness and viability of Potential Providers' proposals, the Authority will be testing functionality of all the following elements in 6.2 and 6.9 during the evaluation software trials:
- 6.2.1 **Survey Design & Functionality:** The Solution must:
- 6.2.1.1 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.
  - 6.2.1.2 Be able to apply varied survey design and question types including matrix tables, graphics and free text comments.
  - 6.2.1.3 Be able to create surveys using interactive graphics that encourage accurate and consistent survey completion.
  - 6.2.1.4 Allow the Authority to have complete control over the branding and look and feel of all surveys and forms, as well as the URLs and email from Crown Commercial Service (CCS) mailbox addresses.

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- 6.2.1.5 Have the ability to display Crown Commercial Service (CCS) branding.
- 6.2.1.6 Be able to create surveys with easy skip logic functionality, question conditions, branching and the ability to pre-populate with stored data from Salesforce.
- 6.2.1.7 Have the ability to preview questions/pages of surveys during the designing of surveys.
- 6.2.1.8 Allow for easy upload of multiple customer contact records.
- 6.2.1.9 Be able to send surveys from CCS mailboxes addresses and URLs.
- 6.2.1.10 Have the ability to adapt for use on websites.
- 6.2.1.11 The survey software must offer functionality that will allow for surveys to be created and issued outside of the Salesforce CRM platform, i.e. customer or supplier surveys.
- 6.2.1.12 Allow the Authority'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.
- 6.2.1.13 Be able to store and save partial completion of a customer's response to enable surveys to be returned to at a later date.
- 6.2.2 **Integration:** The Solution must be able to:
- 6.2.2.1 Be integrated with Crown Commercial Service's Salesforce CRM Platform by using customers email address, contact name and other contact information to match returned responses.
- 6.2.2.2 All responses to be fed back in real time, to enable Crown Commercial Service to view any data at any given time.
- 6.2.2.3 Pre-populate surveys with data from Salesforce as required.
- 6.2.2.4 Be able to work as a standalone product, as well as being integrated within the Salesforce CRM platform.
- 6.2.2.5 Synchronise data from survey responses back into customer records in Salesforce.
- 6.2.2.6 Both automatically and manually trigger surveys based on multiple interactions for any action, report or workflow within Salesforce, i.e. on delivery of a service or closure of an enquiry.



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- 6.2.2.7 Create and issue real time email alerts for specific responses, i.e. low scoring surveys, to any potential user.
- 6.2.3 **Reporting:** The Solution must enable the Authority to:
- 6.2.3.1 View any data at any given time. All responses to be fed back in real time.
- 6.2.3.2 Produce reports, charts and dashboards on the data collected through customer responses, with export functionality.
- 6.2.3.3 Be able to create and tailor our own dashboards and reports within the platform.
- 6.2.3.4 Analyse and export data into a variety of formats including PDF, Excel 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.
- 6.2.3.5 Identify survey abandonment points and response rates.
- 6.2.3.6 The survey software must have the ability to provide detailed text analytics, i.e. the ability to identify key themes from narrative text responses.
- For example: if thirty (30) response are received with free text responses, and twenty (20) of these contain the word 'Communications', this could highlight that this was an issue referenced by the majority of respondents.
- 6.3 The survey software must have the ability to transfer existing survey data from a previous Provider. Potential Providers are required to provide evidence of their solution's ability to achieve this.
- 6.4 Server Access: Potential Providers are required to note that the Authority uses a Cloud based approach so no access to their servers will be possible throughout both the integration stage and the contract duration.
- 6.5 The survey software must store customer data onshore (EU data centre). Potential Providers must provide evidence of their data storage arrangements.
- 6.6 The survey software must support GDPR compliance. Potential Providers must agree to comply with GDPR legislation.
- 6.7 **User Access**
- 6.7.1 The solution will need to be available as a multi-user licence which can be allocated to specific users within CCS. The Authority (CCS) will need to be able to reallocate licences, as required, over the term of the subscription.
- 6.7.2 As a minimum, Crown Commercial Service requires ten (10) CCS users to be able to access the product at the same time. A CCS user would be a person creating
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and managing surveys on behalf of the organisation. There are no maximum user caps to specify.

## 6.8 Training

6.8.1 The Potential Provider is required to provide training on the survey software to Crown Commercial Service.

6.8.1.1 Crown Commercial Service will require the ten (10) users to have access to the training.

6.8.1.2 The training will need to be provided at the CCS Norwich office.

6.8.1.3 The training will need to be provided within one (1) week of the contract award.

## 6.9 Support

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

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

6.9.2.1 Telephone support

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

6.9.2.2 Internet Support (via Email/Live Chat).

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

6.9.2.3 Support within the product

a) As a minimum, Crown Commercial Service require in product help and access to the Potential Provider's FAQs and website.

b) Potential Providers are asked to detail the support available within the product within their tender submissions as per Appendix D – Response Guidance.

6.9.3 Any downtime, either scheduled or unexpected should be communicated to Crown Commercial Service within one (1) hour via email to designated licence users with updates every two (2) hours with indications on when service availability will be reinstated.

## 6.10 Trial of Software at Evaluation Stage

6.10.1 As part of the evaluation process, the Authority requires a trial of the Potential Provider's software, to ensure the solution meets the requirements set out in this Appendix B Statement of Requirements.

6.10.2 The software trial is a mandatory requirement; Potential Provider's bids will be deemed non-compliant if they are able to provide trial access to their software.

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- 6.10.3 Potential Providers are required, in their bid submission, to provide the Authority with the appropriate access tool (such as log-in details or key-code) and instructions to enable access to the software.
- 6.10.4 Access to the trial software will be required for a three (3) week period during the evaluation stage, as detailed in the procurement timetable of the Invitation to Tender (ITT) Document.
- 6.10.5 Further details of the evaluation scoring criteria can be found within the Appendix D Response Guidance and Invitation to Tender document.

**7. KEY MILESTONES**

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

Milestone	Description	Timeframe
1	Survey Software to be accessible to The Authority on the day of contract commencement.	On Contract commencement date (1 <sup>st</sup> June 2018)
2	The multi user licence/user licences will begin on the day of the contract commencement.	On Contract commencement date (1 <sup>st</sup> June 2018)
3	The Authority to receive training of the survey software.	Within 1 week of Contract Commencement
4	Successful Provider to commence working with the Authority to integrate the survey software.	On Contract Commencement Date (1 <sup>st</sup> June 2018)
5	Successful provider will have achieved successful Integration of the survey software within the Salesforce system, on both live and production servers	Within 2 weeks of Contract Award – i.e. by 15th June 2018
6	Support during the entire contract term.	Throughout the duration of the contract

**8. AUTHORITY’S RESPONSIBILITIES**

8.1 The Authority will ensure their relevant staff are available to receive training within one week of Contract Award.

**9. REPORTING**

9.1 Not Applicable.

**10. VOLUMES**

10.1 Crown Commercial Service require the survey software to allow for a minimum of:

- 10.1.1 One Hundred (100) different surveys to be created, per twelve (12) months.
- 10.1.2 Two Hundred and Fifty Thousand (250,000) survey requests issued (One Hundred and Fifty Thousand (150,000) through Provider, One Hundred Thousand (100,000) through Salesforce), per twelve (12) months
- 10.1.3 Up to a (One Million) 1,000,000 survey responses to be received and stored.



10.1.4 These figures at 10.1.1, 10.1.2 & 10.1.3 are indicative and based on current volumes but the expectation going forward is that these numbers may increase by a maximum of 25%.

**11. CONTINUOUS IMPROVEMENT**

11.1 The Provider should use six (6) monthly contract review meetings to inform the Authority 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 the Authority. These meetings do not need to be face to face, a conference call will suffice.

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

11.3 The Provider should present proposed new ways of working to the Authority during six-monthly Contract review meetings.

11.4 Changes to the way in which the Services are to be delivered must be brought to the Authority's attention and agreed prior to any changes being implemented.

**12. SUSTAINABILITY**

Not Applicable

**13. QUALITY**

13.1 Not Applicable

**14. PRICE**

14.1 Prices are to be submitted via the e-Sourcing Suite within the Appendix E Pricing Schedule, excluding VAT.

14.2 Potential Providers are also required to submit a formal, company-headed quotation in addition to the Appendix E Pricing Schedule.

**15. STAFF AND CUSTOMER SERVICE**

15.1 The Authority 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.

15.2 Potential Provider's staff assigned to the Provision of Survey Software Contract shall have the relevant qualifications and experience to deliver the Contract.

15.3 The Potential Provider shall ensure that staff understand the Authority's vision and objectives and will provide excellent customer service to the Authority throughout the duration of the Contract.

**16. SERVICE LEVELS AND PERFORMANCE**

16.1 The Authority will measure the quality of the Provider's delivery by:

KPI/SLA	Service Area	KPI/SLA description	Target
1	Delivery timescales - <i>Training</i>	The ability to achieve the required key milestones which include: Training on the survey software to the Authority's staff within (one) 1 week of contract award.	100%
2	Delivery timescales -	The ability to integrate the survey software within the Salesforce system, on both live and production	100%



	<i>Software Integration</i>	servers within two (2) weeks of contract award. NB. The Authority uses a Cloud based approach so no access to their servers will be possible.	
3	Service Delivery	The ability to provide <b>telephone and internet (via email) support</b> to the Authority between the hours of 8am to 6pm, Monday to Fridays, excluding public holidays as a minimum.	100%
4	Service Delivery	The ability to notify the Authority of any downtime, either scheduled or unexpected should be communicated to the Authority within one (1) hour via email to designated licence users, with updates every two (2) hours with indications on when service availability will be reinstated.	100%

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

## 17. SECURITY REQUIREMENTS

17.1 The Potential Provider will only be providing access to their survey product so will have no day to day requirement to visit Authority's premises. When a meeting is required then staff will be supervised by The Authority's personnel at all times.

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

17.3 Potential Providers have also been required to be certified under the Cyber Essentials Scheme (both parts).  
Details can be found here: <https://www.gov.uk/government/publications/cyber-essentials-scheme-overview>.

17.4 The survey software must support GDPR compliance. Potential Providers must agree to comply with GDPR legislation. (As per 6.6 of Section 6 – The Requirement).

## 18. INTELLECTUAL PROPERTY RIGHTS (IPR)

18.1 All data collected through the use of the product shall remain the property of the Crown Commercial Service and will under no circumstances be used by the Provider.

18.2 The Potential Provider is able to retain IPR on the design solution, as this is not a bespoke requirement.

## 19. PAYMENT

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

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

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**20. ADDITIONAL INFORMATION**

20.1 Potential Providers are reminded of the requirement to submit a formal, company-headed quotation in addition to the Appendix E Pricing Schedule.

20.2 Potential Providers are reminded of the mandatory requirement to provide access for a trial of the Potential Provider's software during the Evaluation stage, as described under section 6.10.

**21. LOCATION**

21.1 The location of the Services will be carried out at:

Crown Commercial Service  
Rosebery Court  
St Andrews Business Park  
Norwich  
NR7 0HS