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| CUSTOMER: | UK Trade and Investment |
| PHASE: | Discovery 13 |
| START DATE: | 18/05/2015 |
| TIMEFRAME: | 4 Months |

# RESPONSES DUE: 13/05/2015

# CURRENT SITUATION / BACKGROUND INFORMATION:

UKTI’s Investment Group encourages and supports overseas companies to look at the UK as the best place to set up or expand their business. UKTI’s Corporate Report ‘Britain Open for Business: the Next Phase’ sets a number of challenging priorities which are intended to maintain the UK’s position as the first choice for foreign direct investors in Europe. Since 2011, the delivery of support to foreign direct investors in the UK has been provided by an external service provider. This includes working with UKTI’s local delivery partners to support foreign investors, with the aim of increasing foreign direct investment into the UK.

In 2012 UKTI and its service provider agreed to develop a data handling system to complement UKTI’s main data management system: the Customer Data Management System (CDMS). The new system was the National Inward Investment Pipeline (NIIP). Restricted access to the NIIP was offered to UKTI’s local delivery partners so that they could consult the NIIP for anonymous information about investment projects that they are not directly involved in, and full information about the projects they are directly involved in. The same opportunity to offer restricted views and access is not available on CDMS which is why a decision was made not to give partners access to the main UKTI data management system. As part of the retender of the Investment Service contract UKTI has made the decision to retire the NIIP - complying with the Government Digital (GDS) Service Design Manual. As a result, a new solution is needed to continue offering local partners restricted views of investment projects in their areas as well as providing a project management tool for our external service provider.

Based on the Government Digital Service (GDS) Design Manual, and using the agile project management approach, a UKTI project team has been identified within the organisation to deliver a solution before the NIIP retirement in July 2015. This solution is to provide restricted views of CDMS data for local delivery partners, where they are involved in a project, an anonymous view of the projects in which they are not involved, as well as having a project management tool. It is essential that data within the new solution is connected to our existing Microsoft Dynamics CDMS system via an API feed, and ensuring the feasibility and delivery of this with existing and new suppliers will be an essential part of this roll - as will the technical development of our CDMS to ensure any unmet need is met following NIIP retirement.

# CURRENT TECHNOLOGIES AND LANGUAGES

UKTI’s Customer Data Management System (CDMS), its main repository for customer data; a Microsoft CRM Dynamics system. The successor to the NIIP will need to exchange data with CDMS via an API feed.

# CURRENT ROLES AND RESPONSIBILITIES OF THE CUSTOMER

The UKTI team fulfil the following roles:

Service Owner

Business Analyst

Product Manager

Product Manager

Delivery Manager

Delivery Manager

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# REQUIRED OUTCOMES

The UKTI project team is looking for a partner to support the delivery of this solution; providing technical leadership and challenge to providers. It is anticipated that the chosen supplier will work 2 days per week on a flexible basis.

The chosen supplier will have extensive technical knowledge in Microsoft CRM Dynamics system, experience of identifying detailed technical requirements and have the confidence to challenge external supplier assumptions and proposals in order to safeguard the best interests of UKTI. In addition they will have extensive experience of successful project delivery using an agile approach, having worked collaboratively to deliver successful solutions within challenging timescales.

# CAPABILITIES AND ROLES

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| **CAPABILITY** | **CUSTOMER’S REQUIRED OUTCOME** | |
| Software Engineering and Ongoing Support | Technical Architect | Technical knowledge required: need to provide technical leadership to the project team by:   * Advising on aspects of the project * Identifying detailed technical requirements * Challenging external supplier assumptions and proposals in order to safeguard the best interests of UKTI * Providing in depth knowledge of Microsoft CRM Dynamics |

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| PRICING MODEL Time and Materials |  |
| CUSTOMER LOCATIONS 1 Victoria Street, London SW1H 0ET |  |

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| HOW TO RESPOND Please submit the following:   * CVs of potential candidates * Pricing (please ensure that this is included on a cover sheet and not within the CV) * include references of working with Microsoft CRM Dynamics systems  TEST & DEVELOPMENT REQUIREMENTS None |  |

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