Document for responses to RSSB tender request

ERP/CRM Tender Response Document

Encs

Appendix A – CRM Requirements

Appendix B – ERP Requirements

Appendix C – CRM MoSCoW

Appendix D – ERP - MoSCoW

**Introduction**

RSSB ([www.RSSB.co.uk](http://www.RSSB.co.uk)) are seeking to homogenise their central internal systems and deliver these going forward by implementing what will be an essentially “off the shelf” ERP solution. RSSB is also seeking to deliver a more effective customer experience to our membership and we envisage this will require a separate but integrated fully fledged CRM system – also “COTS” in nature.

**Guidance to Tenderers:**

Tenderers should respond directly to the information request above in the context of describing how it intends to fulfil the requirements of the Specification detailed in Appendices A, B, C and D.

**Tenderers should note the following:**

The selection and evaluation criteria and weightings provided indicate the relative importance of each question (which should be taken into consideration when constructing a response);

RSSB is seeking to award a contract for Phase 1 of the project at the end of September 2016, and the solution should be seamlessly configured and implemented by the end of March 2017.

**SELECTION CRITERIA**

**Pass / Fail Questions**

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| **Question** | **S.1** | **Weight** | **Pass/Fail** | **Word Limit** | **1500** |
| Subject | *Capability to deliver full ERP solution implementations.* |
| Information request | *RSSB are seeking a single supplier to implement both ERP and CRM.**Please describe your experience in delivering full* ***ERP*** *implementations (of a similar scope to this requirement) into similar sized organisations to RSSB (circa 300 staff).**Please provide examples of previous ERP implementations, at least one of which must be willing to act as a reference site (and one must be an implementation in the last calendar year) and converse with RSSB regarding their experience of working with you. If possible this should provide detail of any experience delivering to not for profit organisations.**This information should also include the modules / areas of operations that were implemented as part of each solution* |
| Criteria | *Relevant demonstrable experience of delivering ERP solutions to similar sized businesses over a reasonable historical period (last 5 years).* |
| Tenderer Response |

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| **Question** | **S.2** | **Weight** | **Pass/Fail** | **Word Limit** | **1500** |
| Subject | *Capability to deliver full CRM solution implementations.* |
| Information request | *RSSB are seeking a single supplier to implement both ERP and CRM.**Please describe your experience in delivering full* ***CRM*** *solutions of a similar scope to this requirement into similar sized organisations to RSSB (circa 300 staff). This should describe any particular experience in delivering into not for profit organisations where requirements may have a different emphasis to those of a purely commercial business. Also any experience delivering CRM into a membership organisation should be described.* *Please provide examples of previous CRM implementations, at least one of which (and one must be an implementation in the last calendar year) must be willing to act as a reference site and converse with RSSB regarding their experience of working with you.* |
| Criteria | *Relevant demonstrable experience of delivering CRM solutions to similar sized businesses over a reasonable historical period (5 years).* |
| Tenderer Response |

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| **Question** | **S.3** | **Weight** | **Pass/Fail** | **Word Limit** | **1500** |
| Subject | *Seamless integration and interoperability between CRM, ERP and the Microsoft technology stack.* |
| Information request | *RSSB has invested heavily in the full Microsoft technology stack, please describe your previous experience in as much detail as possible and explain how you have delivered a seamless user experience between CRM and ERP but also maximum integration and* ***interoperabilit****y between CRM, ERP and the existing Microsoft technologies currently in operation within RSSB.**Specifically, this should cover:** *SharePoint (+SharePoint Online)*
* *Office (and 365)*
* *Outlook (especially maintaining bi lateral synchronisation of calendar entries between CRM)*
* *One Drive*
* *Skype for Business*
* *Project Online*
* *Windows Mobile*
 |
| Criteria | *Relevant demonstrable experience of integration* ***and*** *interoperability between CRM/ERP products with Microsoft technologies*  |
| Tenderer Response |
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| **Question** | **S.4** | **Weight** | **Pass/Fail** | **Word Limit**  | **300** |
| Subject | *Insurance* |
| Information request | *Please confirm whether you have the levels of insurance cover detailed below, or commit to obtaining the level of insurance cover prior to the commencement of the contract:**• £5 million Professional Indemnity (for the life of the contract plus 6 years)* *• £5 million Public Liability* |
| Criteria | *Tenderers must confirm and self-certify that they have the levels of insurance cover detailed below, or commit to obtaining the level of insurance cover prior to the commencement of the contract.* |
| Tenderer Response |

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| **Question** | **S.5** | **Weight** | **Pass/Fail** | **Word Limit**  | **1000** |
| Subject | *Project phase 1 delivery* |
| Information request | *The project to implement Phase one must be completely delivered by March 2017.* |
| Criteria | *Tenderers must explain and confirm that they have the necessary available resource and time to deliver phase one of the project to completion by March 2017. Please explain in detail your resource availability and how you will deliver to this timescale.*  |
| Tenderer Response |

**EVALUATION CRITERIA (Award)**

**Technical**

**Pass / Fail Question**

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| **Question** | **A.1** | **Weight** | **Pass/Fail** | **Word Limit** | **1500** |
| Subject | *MoSCoW Requirements Delivery - “Must Have” items* |
| Information request | *RSSB have used the widely accepted principles of MoSCoW to define the priority of delivery for requirements.**Please explain – at a high level – how the proposed solution / solutions will meet the requirements Indicated as “Must Have” in the attached appendices.**In addition:**Please use the following Spreadsheets** *Appendix C – CRM MoSCoW schedule*
* *Appendix D – ERP MoSCoW schedule*

*In the “Deliverable in requested phase” column you should use the drop down box to select your response. Only these responses are accepted. If the response indicates that customisation is required, you must provide your* explanation in ***Brief*** in the “Explanation” column. |
| Criteria | Tenders will be evaluated on whether ***ALL “***must have” requirements are met. *Responses for All ‘Must Have’ requirements are between options A to E. For the avoidance to doubt Option E for any one of the ‘Must Have’ requirements is considered a fail.**There is a* ***strong*** *preference for “Out of the Box” functionality but if necessary minimal delivery by customisation / development of some kind is acceptable. Explanations of customisation should be short and concise but deal with all salient points.* |

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| **Question** | **A.2** | **Weight** | **7** | **Word Limit** | **As required** |
| Subject | *MoSCoW Requirements Delivery (Should, Could, Won’t Have)* |
| Information request | *RSSB have used the widely accepted principles of MoSCoW to define the priority of delivery for requirements.**Please explain – at a high level – how the proposed solution / solutions will meet the requirements Indicated as “Should Have, Could Haveand Would Like to Have” in the attached appendices.**In addition:**Please complete the following Spreadsheets** *Appendix C – CRM MoSCoW schedule*
* *Appendix D – ERP MoSCoW schedule*

*In the “Deliverable in requested phase” column you should use the drop down box to select your response. Only these responses are accepted. If the response indicates that customisation is required, you must provide your* explanation in ***Brief*** in the “Explanation” column. |
| Criteria | Tenders will be evaluated and scored on whether each of the (Should, Could~~,~~ Would) requirements are met. Using the principles of MoSCoW higher scores are awarded for different requirements in the ranking below:1. Should Have (5)
2. Could Have (2)
3. Would Like to Have (1)

*RSSB would like to deliver as much functionality as possible in the phases we have identified. In order to deliver as much of the MoSCoW requirements as soon as possible there is a* ***strong*** *preference for “Out of the Box” functionality but if necessary minimal delivery by customisation / development of some kind is acceptable. Explanations of customisation should be short and concise but deal with all salient points.*  |
| Tenderer Response |

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| **Question** | **A.3** | **Weight**  | **5** | **Word Limit**  | **None** |
| Subject | *Customizations to base product (Part A)* |
| Information request | *Based on your responses in A.1 and A.2 you will be scored on the ranking detailed below over all of the requirements in the MoSCoW schedule.* |
| Criteria | *We are looking for a COTS product, as much as possible, with the minimum required customisation to deliver the requirements.**Clarifies the extent of bespoke customisation work required to meet RSSB objectives. RSSB are concerned that major customisations to the base product will result in higher development and support costs and lead to issues in future regarding the application of major upgrades from the product vendor. This is obviously a situation that RSSB seeks to avoid / mitigate as much as possible.* |
| Tenderer Response |
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| **Question** | **A.4** | **Weight**  | **2** | **Word Limit**  | **None** |
| Subject | *Customizations to base product (Part B)* |
| Information request | *Please explain at a high level – given the technologies you have chosen to deliver the requirements – and the level of customisation you have indicated in your responses as a whole – what issues may RSSB encounter in the longer term and implementation* |
| Criteria | *We are looking for a COTS product, as much as possible, with the minimum required customisation to deliver the requirements.**Clarifies the effect of bespoke customisation work required to meet RSSB objectives. RSSB are concerned that major customisations to the base product will result in higher development and support costs and lead to issues in future regarding the application of major upgrades from the product vendor. This is obviously a situation that RSSB seeks to avoid / mitigate as much as possible.* |
| Tenderer Response |
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| **Question** | 1. **5**
 | **Weight** | **8** | **Word Limit** | **1500** |
| Subject | *Seamless integration and interoperability between CRM, ERP and the Microsoft technology stack.* |
| Information request | *RSSB has invested heavily in the full Microsoft technology stack, please describe your suggested technical solution in as much detail as possible and explain how this will deliver a seamless user experience between CRM and ERP but also maximum integration and* ***interoperabilit****y between CRM, ERP and the existing Microsoft technologies currently in operation within RSSB.**Specifically, this should cover:** *SharePoint (+SharePoint Online)*
* *Office (and 365)*
* *Outlook (especially maintaining bi lateral synchronisation of calendar entries between CRM)*
* *One Drive*
* *Skype for Business*
* *Project Online*
* *Windows Mobile*
 |
| Criteria | *Please explain in as much detail as possible how your proposed platform will provide this expected level of integration* ***and******interoperability*** *between CRM/ERP products* ***and*** *with RSSB’s existing Microsoft technologies* |
| Tenderer Response |
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| **Question** | **A.6** | **WEIGHT**  | **2** | **Word Limit**  | **400** |
| Subject | *Segmented Secure Environment for data*  |
| Information request | *Please explain the methods for securing data for relevant areas of RSSB operations (for example for CIRAS) that still enables all data to coexist in the same central data store – MoSCoW reference CRM 1.01.1* |
| Criteria | *Detail is provided as to methods of securing discrete datasets within the same CRM solution. CIRAS has a major requirement for data to be secured against unauthorised viewing either internally or externally – this is a highly sensitive reputational issue given the nature of their work. We are expecting to see clear evidence of how this is achieved and also additional security layers around data held on cloud servers.*  |
| Tenderer Response |

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| **Question** | **A.7** | **Weight** | **6** | **Word Limit** | **2000 (Exc. CV information)** |
| Subject | *Delivery Team* |
| Information request | *Please define the* ***structure*** *of your delivery team for both ERP and CRM and identify and provide CV information for the key individuals who will be involved in the implementation of the project. This should include the following streams:** *Project Management*
* *Account Management*
* *Technical ERP implementation with the chosen technologies*
* *Technical CRM implementation with the chosen technologies*
* *Training Management and Skills transfer*
* *Change Management*
* *Post implementation BAU support*

*You should also define the depth of your resource to deliver this project and explain how you will cope with the unexpected absence of any one of those individuals you have identified as key delivery staff.**The tenderer should provide evidence that gives RSSB full confidence that the project team have the expertise and experience to deliver the project.* |
| Criteria | *Demonstrable technical and soft skills to deliver the project plus depth and accessibility of delivery resources within organisation. We are expecting to see key individuals with significant experience of delivering projects of this nature and sensible plans around ensuring continuity of delivery irrespective of the absence of key members of the delivery team.* |
| Tenderer Response |

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| **Question** | **A.8** | **WEIGHT**  | **7** | **Word Limit** | **None** |
| Subject | *An effective project plan* |
| Information request | *Please illustrate the high level plan for delivering all aspects of the project. This should define both the methodology you will be using and also the key work streams, milestones, roles and responsibilities, risks and dependencies, and key stages for RSSB approval (sign off) for ensuring the project is delivered on time, with all required functional requirements and within budget.* *It should also demonstrate how you will incentivise your own delivery to meet these project milestones as per the agreed project plan.* |
| Criteria | *A demonstrably coherent plan to deliver all aspects of the project. We are expecting to see a clear methodology and very regular delivery gateways / milestones demonstrably tied to implementation of testable functional requirements. Given tight timescales – suppliers should demonstrate how they will keep control of and track the project is on target at all stages of delivery.**This project plan must clearly show how the tenderer will achieve effective delivery of Phase one by March 2017 – both in resource and implementation schedule.* |
| Tenderer Response |

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| **Question** | **A.9** | **WEIGHT**  | ***1*** | **Word Limit** | **1000** |
| Subject | *RSSB Resource commitment* |
| Information request | *Please indicate on a high level plan the timings, extent and nature of RSSB resource requirements you will require to deliver the project to its full extent within the required timescales.* |
| Criteria | *A demonstrably clear appreciation of the necessary timings and extent of RSSB resource commitments to deliver the project successfully. RSSB expect to see a clear picture of the expected and needed resource commitment from ourselves so we can plan for this well in advance. This should include both the type of input required and its extent.*  |
| Tenderer Response |

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| **Question** | **A.10** | **WEIGHT** | **4** | **Word Limit** | **3000** |
| Subject | *Tenderers must demonstrate an effective plan for Training provision*  |
| Information request | *Please explain how you will leave RSSB users competent and self-sufficient in use of the system, what methods will be used for delivering training (champions, floor walking etc.) and how you will enable a knowledge transfer of sufficient scope to allow support and customisations to be carried out by RSSB’s internal IT staff* |
| Criteria | *Leaves RSSB with requisite knowledge to use the system, act as first line support, technical understanding of product. RSSB wish to be self-supporting as much as possible – we wish to embed functional expertise in the different areas of the organisation regarding use of the product and wish to some extent to be able to support a certain level of customisation but in any event all configuration responsibilities ourselves.* |
| Tenderer Response |

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| **Question** | **A.11** | **WEIGHT**  | **1** | **Word Limit** | **1000** |
| Subject | *Understanding of RSSB objectives* |
| Information request | *Please explain your understanding of the reasons for RSSB implementing a new ERP and CRM system, and your view of the benefits that can accrue to the organisation (which should be specific to RSSB) by following this path.*  |
| Criteria | *Detail is provided that gives an understanding of the supplier’s view of the rationale behind the project, shows an understanding of RSSB as an organisation and how it will benefit RSSB in particular. RSSB wants to be seen as a partner in this implementation rather than purely a customer – we are seeking a supplier that is keen to understand our business and work with us to derive maximum benefit from this installation.* |
| Tenderer Response |

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| **Question** | **A.12** | **Weight**  | **Not Scored** | **Word Limit** | **None** |
| Subject | *Presentation* |
| Information request | *Suppliers who are shortlisted in the final stages of award will be invited to demonstrate how you can deliver the functional requirements and how you will work with RSSB.**All Tenderers will be allocated a 90 Minute slot (40 min presentation / remainder Q&A session) in which they will be expected to show clearly and concisely:** *The basic technologies and products that will form the basis of both the ERP and CRM solutions*
* *High level project plan and way of working*
* *How the proposed technical solution will deliver all the requirements contained in the project within the timescales set out (with reference to your answer in question S.4)*
* *Presented by the key members of the project team who will be responsible in delivering the project*
* *Value added elements*

*Note: Shortlisted suppliers may be requested to respond to any pertinent clarification questions on their solution and this may be an iterative process if needs be.* |
| Criteria | *The presentation should be presented by the key members of the project team who will be responsible in delivering the project and have the ability to handle any questions during the Q&A session.**The supplier demonstrates an effective and concise overview of nature of the project and how they will deliver a solution.* |
| Tenderer Response |

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| **Question** | **A.13** | **Weight** | **3** | **Word Limit** | **1000** |
| Subject | *Testing / User Acceptance Procedure* |
| Information request | *Please explain your methods of testing and the procedures for moving discrete areas of functionality from implementation through gateways for testing, implementation and service readiness sign off.* |
| Criteria | *Detail is provided that demonstrates an acceptable process for agreeing completed delivery of functional areas. We expect to see a clear process for agreeing acceptance from RSSB and delivery of the key project milestones. We expect to see clear plans on how UAT will be enabled and delivered which includes how bugs will be managed (kept to a minimum), addressed, accepted by RSSB and resolved.* |
| Tenderer Response |

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| **Question** | **A.14** | **Weight** | **1** | **Word Limit** | **1000** |
| Subject | *Business change management*  |
| Information request | *Implementing an ERP system coupled with an integrated CRM solution represents a major change for RSSB, particularly in such a short time frame, please explain how you will assist in the process of managing this change and the acceptance of it amongst the RSSB user base.* |
| Criteria | *Detail is provided as to what capability you have and how you will assist RSSB in both managing the technical and operational change and gaining user acceptance for the solution. This is a value add proposition. Whilst RSSB can manage certain aspects of internal change we are looking for suppliers who demonstrate a specific expert capability in this area to assist us.* |
| Tenderer Response |

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| **Question** | **A.15** | **Weight** | **3** | **Word Limit** | **1000** |
| Subject | *Post implementation support and maintenance* |
| Information request | *Please explain your intended post project phase support. This should include the immediate period after the implementation and the longer term BAU and “relationship” management.**Please provide full details of your operational support arrangements and what SLA’s these operate under. Essentially you should provide us with a full copy of your commercial support agreement.**Please note that Tier 1 is the responsibility of the RSSB and Tier 1 issues will be manged by RSSB's IM department. General Hours of Support are 8am - 6pm (excluding any UK public or bank holidays).**We are also interested in your view of what the relationship between RSSB wants and yourselves will look like in 2, 3, 5 years and beyond.* |
| Criteria | *Tenderer demonstrates an effective plan to support and maintain RSSB in the short and longer term. RSSB is looking for a partner in this implementation – one that provides us with an effective collaborative long term relationship whilst delivering a responsive and effective level of daily support.*  |
| Tenderer Response |

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| **Question** | **A.16** | **Weight** | **1** | **Word Limit** | **1000** |
| Subject | *“Cloud” Assurance*  |
| Information request | *RSSB have stipulated a “Cloud” based solution. Please provide full details of your assurance regarding provision of this service for both ERP and CRM.**This should include amongst other things** *Recognised Standards Adhered to for Data centre*
* *Disaster recovery plans*
* *Minimum service levels*
* *Operating hours*
* *Geographical Location of Servers*
* *Compliance with ISO270001*
* *Data Security*
 |
| Criteria | *Tenderer demonstrates a minimum expected standard for cloud provision service levels. RSSB are looking for “Big Player” cloud assurance levels. We are looking for high quality connections, fail over and infrastructure support as far as system hosting is concerned with enforceable minimum guaranteed service levels.*  |
| Tenderer Response |

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| **Question** | **A.17** | **Weight** | **2** | **Word Limit** | **1000** |
| Subject | *Mobile Provision*  |
| Information request | *With reference to the attached MoSCoW schedule please identify and highlight the significant variations between the functionality available on mobile devices vs the main client. And any differences between the mobile platforms themselves.* |
| Criteria | *Highlights differences in achievable mobile functionality and the must have requirements. A certain level of mobile functionality will be useful to RSSB. Whilst we appreciate full functionality will not be delivered via mobile devices we would like to understand what level of capability can be delivered. At a minimum we are expecting such things as approval mechanisms, report/dashboard viewing and basic form data entry functionality to be available.* |
| Tenderer Response |

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| **Question** | **A.18** | **Weight** | **5** | **Word Limit** | **1000** |
| Subject | *Data Migration* |
| Information request | *Please explain the basic methodology for the data transition to both the new ERP and CRM systems.**This should include tools used and procedures for validity checking and data cleansing.* |
| Criteria | *Supplier produces an effective plan for data migration between existing internal systems and the new implementation. Data will need to be sourced from a selection disparate systems and spreadsheets. Whilst we understand this will require more detailed investigation we would expect to see some evidence of how you have tackled this previously – also covering off effective plans for data cleansing and acceptance procedure.* |
| Tenderer Response |

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| **Question** | **A.19** | **Weight** | **7** | **Word Limit** | **1000** |
| Subject | *Communication* |
| Information request | *RSSB believe it is key in a project of this size and nature to have regular face to face contact and onsite presence. Please explain with reference to your team how you will facilitate this.* |
| Criteria | *Supplier produces an effective plan for communication and collaboration throughout the projects life cycle. In a project of this nature RSSB believe regular dynamic meetings will be required. We are seeking explanation of your communication plans and methods and how you will interact with us effectively on a regular basis and when project demands may require quick and effective responses to time sensitive situations* |
| Tenderer Response |

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| **Question** | **A.20** | **Weight** | **5** | **Word Limit** | **1000** |
| Subject | *Value Added* |
| Information request | Detail any other ways in which you can add value to the planning, implementation and future use of the ERP/CRM system beyond the service provided for the basic implementation.  |
| Criteria | *The tenderer provides additional value through capabilities, contributions or resources not anticipated by RSSB.* |
| Tenderer Response |

**Total cost of Ownership**

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| **Question** | **A.21** | **Weight** | **30** | **Word Limit** | **None** |
| Subject | *Firm price for Configuration (one-off costs) for ERP and CRM solution* |
| Information request | *Please complete the attached Pricing Schedule entitled ‘Appendix E - RSSB2101 – Pricing Schedule’ which is included in this tender pack.**Please provide firm prices for each element of work for each of the phases – Implementation, licensing and support.**Please be advised that your proposal will not be compliant if the firm prices quoted exceed the budgeted amount for each element for each of the Phases* *RSSB will award the contract for Phase 1 of the project and make the ERP and CRM solution live. This includes all the functionality agreed in Phase 1 of the project.**The supplier shall provide licenses to allow the envisaged user numbers and groups in the specification to use the system as detailed in Appendix A, B, C and D. In addition, please complete the pricing schedule that is attached with the tender documentation in an Excel format only.**Please explain the licensing model proposed to cover all users of the system including RSSB support and development teams. The licensing pricing schedule must clearly show the unit cost including discounts that will be applied for each licence type.* |
| Criteria | *All prices are required to be inserted into the pricing schedule that is attached with the tender documentation in an Excel format only.**A total firm price should be quoted for the delivery of each element of work for each of each year (Implementation, licensing and support).**The tender with the lowest total cost will receive 100% of the available weighted score (30%). Other Tenderer’s tenders will receive a pro-rated relative to the lowest cost according to the following formula:**Score of other tender = lowest tender total cost / other tender total cost x 100%.* |
| INFORMATION ONLY – PLEASE COMPLETE THE PRICING SCHEDULE |