



Crown
Commercial
Service

Bid Pack

Attachment 3 – Statement of Requirements

Contract Reference: CCSO21A40

Provision of User Licences for Salesforce System

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1. PURPOSE

- 1.1 The Crown Commercial Service (hereafter referred to as 'the Buyer' or 'the Authority') is seeking to procure the services of a sole Supplier for the provision of user licences for the SAAS cloud based platform, Salesforce.

2. BACKGROUND TO THE CONTRACTING AUTHORITY

- 2.1 Crown Commercial Service (CCS) is the largest procurement organisation in the UK, providing commercial solutions to the public sector by improving the way we buy goods and services, saving money for the taxpayer and using the government's buying power to support the economy.
- 2.2 CCS advises and negotiates on behalf of Central Government (CG) departments and the Wider Public Sector (WPS) to obtain better value services, engaging with the market and helping to make the procurement process faster, less costly, compliant and more effective for suppliers and buyers and to actively improve the value gained from contracts across government.

3. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT

- 3.1 The current Contract for a Customer Relationship Management (CRM) solution (Salesforce) expires on the 31st January 2022. This procurement is for a single Contract to commence 28th January 2022 until 27th January 2027, with an option to extend up to 24 months in two 12-month extension periods.
- 3.2 The Buyer is seeking to put in place a long-term Contract solution, to enable a return on investment in both the Salesforce platform, people (users) and training to date.
- 3.3 The procurement shall be run via CCS Commercial Agreement RM6194 Back Office Software (BOS) as this offers the Buyer with the option to procure a long-term Contract.

4. DEFINITIONS

Expression or Acronym	Definition
SF	means Salesforce
SaaS	means Software as a Service
Buyer	means Crown Commercial Service (the Contracting Authority)
DMp	means Digital Marketplace
CxD	means Customer Experience Directorate
CRM	means Customer Relationship Management

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5. THE REQUIREMENT

- 5.1 The Buyer is looking to renew its current user licences for the SAAS cloud based platform, Salesforce, to ensure consistency and no loss of service to BAU operations.
- 5.2 The procured Salesforce user licences will support the Buyer's ability to continue to provide the services to its customers that are enabled by the current functionality embedded within the Salesforce Platform. It will also provide the following but shall not be limited to:
- 5.2.1 Support the Customer First approach leveraging Data Services and Insights
 - 5.2.2 Provide a unified data view of customers
 - 5.2.3 Allow for shared Enterprise Data
 - 5.2.4 Provide better segmentation of customer database
 - 5.2.5 Provide a single contract database for CCS agreements and Services
 - 5.2.6 Enable a workflow for procurement tasks
 - 5.2.7 Provide an end to end business development process joining up all Buyer staff through the use of unified process, definitions, knowledge and access for all staff to the technology tools that form the business development platform, Salesforce Lightning and Pardot.

5.3 Mandatory requirements

- 5.3.1 The user licenses for Salesforce platform **MUST** provide the following mandatory requirements:
- 5.3.2 The SF licences must deliver as a cloud based Software as a Service (SaaS) as per <https://www.gov.uk/guidance/government-cloud-first-policy> and accessible via modern W3C compliant web-based browsers such as Chrome, Edge and Safari.
- 5.3.3 The SF licences Supplier must supply login accounts to access the SF Platform to all Buyer staff who currently have user licences, and as the same licence type.
- 5.3.4 The new SF licences Supplier must meet all current IT security requirements for IT systems.
- 5.3.5 The SF Licences must receive free and regular software updates as part of the core Salesforce product releases.
- 5.3.6 The SF licences must include a full copy Sandbox for utilising as the Buyer's Pre-Production environment.
- 5.3.7 The core License types **MUST** include:
 - Sales and Service Cloud Unlimited Edition
 - Partnership Community Licences - Members
 - Customer Community Plus - Unlimited Edition - Logins
 - Pardot - Advanced

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- Pardot - Advanced - Additional Contacts
- Premier Success Plan (Support) – Pardot

5.4 The User Licences will support the following operational processes for CCS:

- 5.4.1 Procurement management:
 - (a) Case management
 - (b) Workflows
 - (c) Reporting
- 5.4.2 Customer Service (customer contact)
 - (a) Case management
 - (b) Leads and Opportunities management (LightningUI)
 - (c) Workflow
 - (d) Reporting
 - (e) Knowledge Base
- 5.4.3 Business Development Process/Pipeline
 - (a) Leads and Opportunities management (LightningUI)
 - (b) Sales Pipeline Workflow
 - (c) Reporting
- 5.4.4 Contract management and reporting
 - (a) Contract register
 - (b) Document storage
 - (c) Change control
 - (d) Automated reminders
 - (e) Spend tracking
- 5.4.5 Commercial Agreement (CA) Management
 - (a) Case management
 - (b) Leads and Opportunities management (LightningUI)
 - (c) Joint partnership opportunities management
 - (d) Workflow
 - (e) Reporting
 - (f) Knowledge Base
- 5.4.6 Purchasing Platform - Mercato
 - (a) Community Member and Logins (for API/SSO calls)
- 5.4.7 Data and Business Insights
 - (a) Reporting
 - (b) Data uploader
 - (c) System Administration
 - (d) Management of Framework Master / Golden records
- 5.4.8 Tech Operations
 - (a) Reporting
 - (b) Data uploader
 - (c) System Administration

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- (d) Full Copy Sandbox (for Pre-Production environment)
- 5.4.9 HR
- (a) Case management
(b) Reporting
- 5.4.10 Finance
- (a) Case management
(b) Reporting
- 5.4.11 Marketing
- (a) Leads and Opportunities management (LightningUI)
(b) Pardot
(c) Reporting
- 5.4.12 Each of the proposed Business requirements/improvements listed in the below table **List of Functionality**.
- 5.4.13 **List of Functionality**

Business Capabilities / CRM initiative	Key user & Business requirements	LICENSE NEEDS
Salesforce Lightning Transition Leads & Opportunities Management	<p>Managing a 'sales pipeline' in Lightning is core functionality in Salesforce. This utilises the 'Opportunity' and 'Lead' objects:</p> <p>The core requirements include:</p> <ul style="list-style-type: none"> • Salesforce Lightning UI • Business Development Process workflow & Sales Pipeline • Opportunity and Pipeline Forecasting • Dashboards and Reports <p>Some of the benefits of these capabilities:</p> <ul style="list-style-type: none"> • Sales' Opportunities - supporting customers to make use of Commercial Agreements. 	<p>Lightning (including, BDP /Sales Pipeline) functionality will be widely used across the business - including Customer Services, Strategic Category, Customer Engagement, and the Procurement Operations Call-offs and Sourcing teams.</p>

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Partnership Community Licences	<ul style="list-style-type: none"> Supporting teams focus on the right leads at the right time. Quantifying the opportunities that a sales team has with customers to identify the customers that are most likely to convert <p>The Partnership Community licences will enable CCS to manage opportunities jointly where there is a partnership with other Public Sector organisations.</p> <p>Some of the key benefits include but are not limited to:</p> <ul style="list-style-type: none"> Dynamic approach to sales opportunities, joined up with the Buyer's partners. Collaborative partnering and accountability of ownership and tasks to manage opportunities. 	
Customer Service	<p>The current licence headcount is expected to continue to use the platform in the way(s) they do today.</p> <p>The core requirements include:</p> <ul style="list-style-type: none"> Salesforce Lightning UI Moving to running Call-Off procurements Plans to introduce Outbound Dialing and 'Web chat' functionality Further enhancements to call centre automation and Telephony solution, requiring integration between the Platform and RingCentral Continued use of Knowledge Base NPS: Plans to integrate 	New users will be as detailed in section 6 (Volumes).

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	Smart Survey with the platform	
Commercial Agreement Management	<p>Functionality, including workflow, to support Commercial Agreement Management.</p> <p>Salesforce is used as the database of suppliers and frameworks, as well as Contracts.</p> <p>The core needs over the next contract period include:</p> <ol style="list-style-type: none"> 1. Salesforce Lightning UI 2. Business Development Process workflow & Sales pipeline 3. Forecasting (commercial agreements, monthly basis) 4. Case management. Contact management: 2nd line support for SF queries from service desk 5. Contract information / management 	CAM staff will be users of Lightning including (BDP / Sales pipeline, as detailed in section 6 (Volumes).
Procurement and Sourcing	Implementation work required following discovery between Salesforce and Jaggaer.	<p>Procurement Operations staff who currently have a licence will continue and grow.</p> <p>Any additional users will be as detailed in section 6 (Volumes).</p>
Marketing	<p>The current licence headcount is expected to continue to use the platform in the way(s) they do today.</p> <p>The core plans and needs over the next contract period include:</p>	<p>Marketing users will continue to require core Salesforce licenses and Knowledge licenses - but further Discovery is needed to establish how Pardot will be used for current and future Marketing.</p> <p>Marketing headcount will continue to grow. New users will be as detailed in section 6</p>

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	<p>Pardot Integration Phase 1 - complete</p> <p>Phase 2:</p> <ul style="list-style-type: none"> - Create Leads and push to SF - Ability to advanced segmentation using SF data (not just sector) - Ability to automate emails, via workflows (behavioural/engagement activities) - web to lead - Segmentation: SECTOR - rms in Pardot <p>Future phases:</p> <ul style="list-style-type: none"> - Prospect scoring - ROI (events and campaigns) - Potential Website integration 	(Volumes)
Systems Integrations	<p>The user licences procured must provide access to a platform that supports API-based integration capabilities and API-first development; specifically, either a RESTful web service, with data presented in a JSON or XML format, or a SOAP-based API with data in an XML format. Or Streaming API.</p>	<p>API access is part of the standard SF offering.</p> <p>Access to custom content and API will remain in place once the contract is renewed and the Buyer's current instance is kept in place.</p>
Purchasing Platform	<p>Customer Community Plus LICENSES are used for user authentication via Mercato purchasing platform.</p> <p>There are 2 types of licence: Member and Login.</p> <p>Licence commitment for a new contract can be Reduced for</p>	<p>Licence figures are as detailed in section 6 (Volumes).</p>

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	<p>'Member' in line with current usage metrics. This new commitment for Member licences (200) provides a contingency of double the amount of licences currently in use.</p> <p>In line with usage metrics for Logins, this licence commitment should be increased to 10,000 to meet demand.</p> <p>It should also be noted that there is also a move away from SF as a point of verification (which is where the Community Licenses are currently used)</p>	
Data and Business Intelligence	Reporting Data uploader System Administration Management of Framework Master / Golden records	Additional licences will be covered by the margin set out to represent the proportional use of the platform over time, as detailed in section 6 (Volumes).
HR	The current licence headcount is expected to continue to use the platform in the way(s) they do today.	HR users will continue to require core Salesforce licenses to manage enquiry cases, and so will be included in the licence figures as detailed in section 6 (Volumes)
Finance	The current licence headcount is expected to continue to use the platform in the way(s) they do today.	Finance users will continue to require core Salesforce licenses for financial reporting and framework forecasting, and so will be as detailed in section 6 (Volumes)
TECH OPS/SUPPORT	<p>Continuation in service - i.e. avoiding the threat of the platform being inaccessible.</p> <p>Ensure we're still licenced for a pre-production environment</p>	Additional licences will be covered by the margin set out to represent the proportional use of the platform over time, as detailed in section 6 (Volumes).

5.5 System Integration

The user licences procured must provide access to a platform that supports API-based integration capabilities and API-first development; specifically either a RESTful web service, with data presented in a JSON

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or XML format, or a SOAP-based API with data in an XML format. Or Streaming API.

6. VOLUMES

Service	Number of Licences/ units 2022/23	Considerations
Service Cloud Lightning CRM - Unlimited Edition	865	<i>50 additional per annum increase</i>
Customer Community Plus - Unlimited Edition –Logins	4000	<i>Included as standard with Unlimited Direct</i>
Partner Community Members	100	<i>New requirement</i>
Pardot - Advanced	1	<i>Included as standard with Unlimited Direct</i>
Pardot - Advanced - Additional Contacts (10,000)	6	<i>Included as standard with Unlimited Direct</i>
Premier Success Plan (Support) – Pardot	1	<i>Included as standard with Unlimited Direct</i>

7. KEY MILESTONES AND DELIVERABLES

7.1 The following Contract milestones/deliverables shall apply:

Milestone/Deliverable	Description	Timeframe or Delivery Date
1	Contract Award	25 January 2022

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2	Inception meeting between successful Supplier and the Contracting Authority	Within 2 weeks of contract award
3	Service commencement / Provision of licenses	28th January 2022 and annually thereafter
4	Service provision review meeting between successful Supplier's contract manager and Contracting Authority's contract manager at the end of every financial quarter	Quarterly as a minimum with dates to be agreed

7.2 The proposed Contract milestones/deliverables may be subject to change.

8. STANDARDS (QUALITY AND SECURITY)

8.1 The Supplier shall comply with the appropriate Standards (or equivalent) as updated and applicable for this contract and for goods or services to be provided which shall include but not be limited to:

- European [accessibility standard EN 301 549](#) where the call off contract includes websites and/or mobile applications as components of the solution to be provided

Service Management Standards:

- BS EN ISO 9001 "Quality Management System" Standard or equivalent.
- ISO 10007 "Quality Management Systems – guidelines for configuration management".

Environmental Standards:

- BS EN ISO 14001 Environmental Management System standard or equivalent.

Accessible IT Standards:

- World Wide Web Consortium (W3C) Web Accessibility Initiative (WAI) Web Content Accessibility Guidelines (WCAG) 2.1 Conformance Level AA
- ISO/IEC 13066-1:2011 Information Technology - Interoperability with assistive technology (AT) – Part 1: requirements and recommendations for interoperability.

Information Technology Standards:

<https://www.gov.uk/government/publications/open-standards-principles>
<https://www.gov.uk/guidance/government-design-principles>
<https://www.gov.uk/service-manual/service-standard>

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<https://www.gov.uk/government/publications/greening-government-ict-strategy>
<https://www.gov.uk/government/publications/open-source-open-standardsand-reuse-government-action-plan>

- ISO 27001 Information Security Management standard or equivalent.
- ETSI TS 103 645 Cyber Security for Consumer Internet of Things Architecture Standards
- ISO 27001 Information Security Management standard or equivalent.
- European [accessibility standard EN 301 549](#) where the call off contract includes websites and/or mobile applications as components of the solution to be provided

8.2 As relevant to the solution to be provided, the Supplier shall support Buyers:

- through successful Service Standard assessments - <https://www.gov.uk/service-manual/digital-by-default>
- to develop Services based on Open Standards Principles and accessible data protocols, to ensure they are interoperable - <https://www.gov.uk/government/publications/open-standards-principles/open-standards-principles>
- to comply with any adopted open standards that are compulsory in government as described at the following link: <http://standards.data.gov.uk/challenges/adopted>

8.3 New standards may be published during the life of the Contract and it is essential that the Supplier keeps abreast of such developments in their product or service area in order to ensure compliance.

8.4 Data Standards

- 8.4.1 UK Government recommends an open approach to data, including the use of common data standards such as the Open Data Standards, and prefers exchange of data via an **Application Programming Interface** (API). All components **SHOULD** offer web APIs supporting RESTful JSON interfaces in accordance with CCS architectural decisions
<https://github.com/Crown-Commercial-Service/CCS-Architecture-Decision-Records/tree/master/doc/adr>
- 8.4.2 The Supplier shall not remove any proprietary notices in the Buyer Data.
- 8.4.3 The Supplier shall not store or use Buyer Data except if necessary to fulfil its obligations.
- 8.4.4 The Supplier shall, in the event that the Buyer Data is processed by the Supplier, supply the data to the Buyer as requested.
- 8.4.5 The Supplier shall ensure that any Supplier system that holds any Buyer Data is a secure system that complies with the Supplier's and Buyer's

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security policy and all Buyer requirements as detailed in the Security standards of the call off.

- 8.4.6 The Supplier will preserve the integrity of Buyer Data processed by the Supplier and prevent its corruption and loss.
- 8.5 The Supplier shall if they suspect that the Buyer Data has or may become corrupted, lost, breached or significantly degraded in any way for any reason, notify the Buyer immediately and will (at its own cost if corruption, loss, breach or degradation of the Buyer Data was caused by the action or omission of the Supplier) comply with any remedial action reasonably proposed by the Buyer.
- 8.6 The Supplier shall agree to use the appropriate organisational, operational and technological processes to keep the Buyer Data safe from unauthorised use or access, loss, destruction, theft or disclosure.
- 8.7 **Security**
- 8.7.1.1 The Supplier will ensure that any Supplier system which holds any protectively marked Buyer Data or other government data will comply with:
- (a) the principles in the Security Policy Framework at 20 <https://www.gov.uk/government/publications/security-policy-framework> and the Government Security Classification policy at <https://www.gov.uk/government/publications/government-security-classifications>
 - (b) guidance issued by the Centre for Protection of National Infrastructure on Risk Management at <https://www.cpni.gov.uk/content/adopt-risk-management-approach> and Protection of Sensitive Information and Assets at <https://www.cpni.gov.uk/protection-sensitive-information-and-assets>
 - (c) the National Cyber Security Centre's (NCSC) information risk management guidance, available at <https://www.ncsc.gov.uk/collection/risk-management-collection>
 - (d) government best practice in the design and implementation of system components, including network principles, security design principles for digital services and the secure email blueprint, available at <https://www.gov.uk/government/publications/technology-code-of-practice/technologycode-of-practice>
 - (e) the security requirements of cloud services using the NCSC Cloud Security Principles and accompanying guidance at <https://www.ncsc.gov.uk/guidance/implementingcloud-security-principles>

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- 8.7.1.2 The Supplier shall refer to Call-Off Schedule 9 (Security) to understand the Contracting Authority's security requirements for this Contract.
- 8.7.1.3 The Supplier shall be required to evidence that they hold a current Cyber Essentials certificate. The Supplier must provide the Buyer with a valid Cyber Essentials certificate required for the Services before the contract is awarded.

9. MANAGEMENT INFORMATION/REPORTING

- 9.1 Potential bidders should refer to Call-Off Schedule 15 (Call-Off Contract Management) to understand the Contracting Authority's requirements for management of information.

10. CONTINUOUS IMPROVEMENT

- 10.1 Potential bidders should refer to Call-Off Schedule 3 (Continuous Improvement) to understand the Contracting Authority's requirements for continuous improvement.

11. SUSTAINABILITY

- 11.1 The Supplier shall, where requested by the Buyer, work with them to identify opportunities to introduce innovation, reduce cost and waste and ensure sustainable development is at the heart of their operations.
- 11.2 The Supplier shall ensure that they consider the relevance of sustainability at all lifecycle stages of the Deliverables provided under this Contract including minimisation of negative impacts and the maximisation of positive impacts on society and the environment.
- 11.3 The Supplier shall, where applicable, ensure that in providing the Deliverables it does so in such a manner as to minimise any negative impact on the environment.

12. STAFF AVAILABILITY AND CUSTOMER SERVICE

- 12.1 Potential bidders should refer to Call-Off Schedule 7 (Key Supplier Staff) for details of relevant qualifications and experience of the Supplier's staff assigned to the Contract to deliver to the required standard.
- 12.2 Potential bidders should refer to Call-Off Schedule 15 (Call-Off Contract Management) to understand the Contracting Authority's requirements for project management and the role of the Supplier Contract Manager.

13. SERVICE LEVELS

- 13.1 Potential bidders should refer to Call-Off Schedule 14 (Service Levels) to understand how the Supplier's performance will be measured.

14. PAYMENT AND INVOICING

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

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

14.3 Invoices should be submitted to: invoicing@crowncommercial.gov.uk

15. CONTRACT MANAGEMENT

15.1 Service provision review meetings shall be between successful Supplier's contract manager and the Buyer's contract manager at the end of every financial quarter.

15.2 Potential bidders should refer to Call-Off Schedule 15 (Call-Off Contract Management) to fully understand the Buyer's requirements for Contract Management and the role of the Supplier Contract Manager.

15.3 The successful Supplier is required to provide a bespoke Business Continuity Plan (BCP) within 12 weeks of contract award.

16. LOCATION

16.1 The Services will be delivered from the successful Supplier's home/chosen offices.

16.2 CCS home office for the project will be The Capital Building, Old Hall Street, Liverpool. L3 9PP.

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