Invitation to Tender

***Fluid Branding – Aligning Sales, Customer Service and Finance using HubSpot CRM & NetSuite***

Ref: Fluid 100713

# 1. About Fluid Branding

Fluid Branding is a market leading, award winning B2B distributor of promotional merchandise.  With offices throughout the UK, Ireland, Malta and The Netherlands, our company provides branded merchandise to organisations across all sectors.  Headquartered in Cornwall, we act as a sourcing and service company, relying on a network of manufacturers, decorators and logistics companies to supply finished product to our clients. At Fluid, we deliver consistently high quality promotional merchandise. That’s what we do and we’re proud of doing it really well. Beyond just selling branded merchandise, our purpose is to create a culture of change that pushes us to do things better every day. Better for you, for the environment and for our people here at Fluid. Our mission is to deliver exceptional customer experiences that are driven by innovation, education, relevance and quality.

# 2. Background and Context

Fluid Branding are already in the process of automating our sales process, using HubSpot as an automation platform. This project would build on this, taking our business processes to the next logical level, aligning our sales teams with service and finance operations. The project will allow us to appoint sales enablement consultants to map our service and finance processes across the business. This will be followed by work to implement these changes through automated workflows and integrations with Netsuite, our existing finance software.

The purchase of this system is part of a grant funded application process and therefore procurement will be subject to grant approval of the project. We will assess tenders received on a Most Economically Advantageous Tender basis.

# 3. Tender requirements

We currently have 3 systems that talk to each other. HubSpot CRM, Netsuite and our bespoke ERP system which was developed and is maintained by our in-house PHP Developers. Currently we have approximately 170k contacts in HubSpot CRM and our revenue is £30m.

The aim of this project is to align the 3 systems to give us the optimum overall process for our Sales, Customer Service and Finance teams to follow, to enable the company to continue it’s rapid growth to over £50m revenue within the next 2 years. We are looking for a HubSpot Platinum Partner to join our in-house development team and our Netsuite consultants.

The successful tenderer will be expected to undertake the following activities:

3.1 Facilitate three in person meetings at our Cornwall HQ - Initiation meeting, mid-project review and a final acceptance meeting.

3.2 Audit Fluid Branding’s existing tech stack and report on where efficiencies may be realised. Our current tech stack comprises HubSpot CRM (Enterprise), Netsuite and our bespoke ERP system.

3.3 Audit Fluid Branding’s existing sales, service and finance processes.

3.4 Make written recommendations on 3.2 and 3.3, including proposed new processes and recommended efficiencies using flowcharts to demonstrate changes. These will be confirmed at the mid-project review.

3.5 Execute agreed changes in HubSpot and liaise with other software platforms to set up integrations and further optimise processes.

**4. Budget**

The total maximum budget available for this commission is £44,500 (excluding VAT) but inclusive of account management, project management and travel expenses.

**Tenders that exceed the total budget will not be considered.**

The budget will be reviewed as part of the tender evaluation detailed in Section 10 and will reflect the degree to which there is a saving on the maximum budget

# 5. Tender and commission timetable

The timescale of the programme is from the date of signing the contract until the 30th June 2023. The timetable for submission of the Tender, completion of the programme are set out below.

|  |  |
| --- | --- |
| **Milestone** | **Date** |
| Date ITT available on Contracts Finder | 12 April 2023 |
| Last date for raising queries | 19 April 2023 |
| Last date for clarifications to queries | 20 April 2023 |
| Deadline to return ITT | 1700: 2 May 2023 |
| Evaluation of ITT | 3 May 2023 |
| Award of Contract | This is subject to successfully obtaining grant funding and will normally be no later than 90 days from contract evaluation |

# 6. Tender submission requirements

Please include the following information in your Tender submission.

6.1 Covering letter (two sides of A4 maximum) to include:

1. A single point of contact for all contact between the tenderer and Fluid Branding during the tender selection process, and for further correspondence.
2. Confirmation that the tenderer has the resources available to meet the requirements outlined in this brief and its timelines
3. Confirmation that the tenderer holds current valid insurance policies as set out below and, if successful, supporting documentation will be provided as evidence:
4. Professional Indemnity Insurance with a limit of indemnity of not less than five hundred thousand (£500,000).
5. Employers Liability Insurance with a limit of indemnity of not less than two million (£2,000,000).
6. Public Liability Insurance with a limit of indemnity of not less than five million (£5,000,000).
7. Conflict of interest statement
8. Confirmation of at least HubSpot Platinum Partner status with over 5 years as a HubSpot partner.
9. Confirmation that the project will be led by a holder of HubSpot Certified Trainer certification.
10. Confirmation that current employees have between them 20 or more HubSpot certifications, including but not limited to:  
    CMS Hub Implementation, Content Marketing, Contextual Marketing, Digital Marketing, Email Marketing, Frictionless Sales  
    Guided Client Onboarding, HubSpot Marketing Software, HubSpot Reporting, HubSpot Sales Software, HubSpot Trainer Certification,  
    Marketing Hub Implementation, Objectives-Based Onboarding, Platform Consulting, Revenue Operations, Sales Enablement, Sales Hub Implementation, SEO, Service Hub Software.
11. Confirmation of ability to meet in person in Fluid’s St Austell HQ for the 3 face to face meetings outlined in Section 3.

6.2 Project proposal - How are you going to deliver the requirement set out in Section 3

6.3 Two examples of similar projects and contract value (Maximum one side of A4 per example)

6.4 A fixed fee for the work

**7. Sub-contracting**

Tenderers should note that a consortia can submit a tender but the sub-contracting of aspects of this commission after appointment will only be allowed by prior agreement with Fluid Branding.

**8. Conflicts of Interest**

Tenderers must provide a clear statement with regard to potential conflicts of interests. Therefore, **please confirm within your tender submission** whether, to the best of your knowledge, there is any conflict of interest between your organisation and Fluid Branding or its programme team that is likely to influence the outcome of this procurement either directly or indirectly through financial, economic or other personal interest which might be perceived to compromise the impartiality and independence of any party in the context of this procurement procedure.

Receipt of this statement will permit Fluid Branding to ensure that, in the event of a conflict of interest being notified or noticed, appropriate steps are taken to ensure that the evaluation of any submission will be undertaken by an independent and impartial panel.

# 9. Tender clarifications

Any clarification queries arising from this Invitation to Tender which may have a bearing on the offer should be raised by email to:

[kyle.scott@fluidbranding.com](mailto:kyle.scott@fluidbranding.com) in accordance with the Tender and Commission Timetable in section 5.

Responses to clarifications will be anonymised and uploaded by Fluid Branding to Contracts Finder and will be viewable to all tenderers.

No representation by way of explanation or otherwise to persons or corporations tendering or desirous of tendering as to the meaning of the tender, contract or other tender documents or as to any other matter or thing to be done under the proposed contract shall bind Fluid Branding unless such representation is in writing and duly signed by a Director/Partner of the tenderer. All such correspondence shall be returned with the Tender Documents and shall form part of the contract.

# 10. Tender evaluation methodology

Each Tender will be checked for completeness and compliance with all requirements of the ITT. Tenders will be evaluated to determine the most economically advantageous offer taking into consideration the award criteria.

**Tender returns will be assessed on the basis of the following tender award criteria**

|  |  |
| --- | --- |
| Ref 6.1 Covering Letter |  |
| Acceptable covering letter including confirmation of the requirements detailed at 6.1 | Pass/ Fail |
| Ref 6.2 Project proposal | 40 |
| Project proposal - How are you going to deliver the requirement set out in Section 3 |  |
| Ref 6.3 Examples | 20 |
| Two examples of similar projects and contract value |  |
| Ref 6.4 Budget | 40 |
| A **fixed fee** for this work (exc. VAT) including travel and other expenses  The lowest bid will be awarded the full 40 marks. Other bids will be awarded a mark that is proportionate to the level of their bid in comparison to the lowest bid i.e. Marks awarded = 40 x lowest bid / bid |  |

**11. Assessment of the Tender**

The reviewer will award the marks depending upon their assessment of the applicant’s tender submission using the following scoring to assess the response:

|  |  |  |
| --- | --- | --- |
| **Scoring Matrix for Award Criteria** | | |
| Score | Judgement | Interpretation |
| 100% | Excellent | Exceptional demonstration of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services. Full evidence provided where required to support the response. |
| 80% | Good | Above average demonstration of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services. Majority evidence provided to support the response. |
| 60% | Acceptable | Demonstration of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services, with some evidence to support the response. |
| 40% | Minor Reservations | Some minor reservations of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services, with little or no evidence to support the response. |
| 20% | Serious Reservations | Considerable reservations of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services, with little or no evidence to support the response. |
| 0% | Unacceptable | Does not comply and/or insufficient information provided to demonstrate that there is the ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services, with little or no evidence to support the response. |

During the tender assessment period, Fluid Branding reserves the right to seek clarification in writing from the tenderers, to assist it in its consideration of the tender. Tenders will be evaluated to determine the most economically advantageous offer taking into consideration the award criteria weightings in the table above.

Fluid Branding is not bound to accept the lowest price or any tender. Fluid Branding will not reimburse any expense incurred in preparing tender responses. Any contract award will be conditional on the Contract being approved in accordance with Fluid Branding’s internal procedures and Fluid Branding being able to proceed.

**13. Tender Award**

Any contract awarded as a result of this tender process will be in accordance with the timetable and Section 12.

# 14. Tender returns

Tenders are to be returned by email.

Tenders are to be returned in accordance with Section 5

Latest date to be returned: As per Section 5

Latest time to be returned: 17:00

Emailed tenders should be sent electronically to [kyle.scott@fluidbranding.com](about:blank) with the following message clearly noted in the Subject box: **Fluid Branding Tender – Ref 100713**

**Tenderers are advised to request an acknowledgement of receipt of their email.**

**15.** **Disclaimer**

The issue of this documentation does not commit Fluid Branding to award any contract pursuant to the tender process or enter into a contractual relationship with any provider of the service. Nothing in the documentation or in any other communications made between Fluid Branding or its agents and any other party, or any part thereof, shall be taken as constituting a contract, agreement or representation between Fluid Branding and any other party (save for a formal award of contract made in writing by Fluid Branding or on behalf of Fluid Branding).

Tenderers must obtain for themselves, at their own responsibility and expense, all information necessary for the preparation of their tender responses. Information supplied to the tenderers by Fluid Branding or any information contained in Fluid Branding’s publications is supplied only for general guidance in the preparation of the tender response. Tenderers must satisfy themselves by their own investigations as to the accuracy of any such information and no responsibility is accepted by Fluid Branding for any loss or damage of whatever kind and howsoever caused arising from the use by tenderers of such information.

Fluid Branding reserves the right to vary or change all or any part of the basis of the procedures for the procurement process at any time or not to proceed with the proposed procurement at all.

Cancellation of the procurement process (at any time) under any circumstances will not render Fluid Branding liable for any costs or expenses incurred by tenderers during the procurement process.