

STATEMENT OF REQUIREMENT – ANNEX A

**712238452 – PROVISION OF SUBSCRIBER CONTRACT RELATIONSHIP  
MANAGER**

**Introduction**

**Purpose**

The requirement is for a fully integrated Customer Relationship Management (CRM) Tool, compliant with the Data Protection Act 2018 (DPA18) and [REDACTED] and the [REDACTED] principles, to improve the communication with, management of, and support to Service Personnel (Regulars and Reserves), veterans and families (including the bereaved).

**Background**

Army Corps Regimental Head Quarters and Regimental Charities have databases holding tens of thousands of personal records [REDACTED]. A centralised database in which the Army Corps Regimental Headquarters and Regimental Charities can manage their data, in a secure environment, has been identified as the overriding requirement.

**Objectives**

The CRM is required to have the following areas of management:

Membership & CRM

- Control of Membership Subscriptions and Renewals
- Multiple address facility
- Contact Profiling
- Individual to organisation inter-relationships
- Letter Production
- Emailing - individual or en masse
- Links with addressing software - e.g. Ideal Postcodes, AFD
- Communication recording
- Web integration
- Contact Campaigns

Fundraising:

- Donation entry
- Reporting

Volunteer Management

Event Management:

- Details of the event,
- sub-events, workshops, breakout sessions,
- accommodation
- Multiple attendees
- Dietary and Access requirements
- Reports
- Seating Plans

## OFFICIAL-SENSITIVE COMMERCIAL

Gift Aid – HMRC Integration

Payments:

- Direct Debit control – BACS Processing
- card payments via third party integration

Groups:

- Branches
- Committees
- Special interest groups
- Members of the groups as well as any officers to be recorded.
- Communications can be easily sent to the selected group members

Sales - Shop

Welfare & Benevolence

Diary

Reports & Exports - Import and Export of specific unique data

Online Services – API/Web integration

Bespoke Modules – Unique to charity business

Telephone and email Support

MOD Cyber Security Compliance

GDPR Compliancy

### Scope

Included:

1. This requirement is to support approximately 40 Corps Charities/Associations all with individual databases holding between 1000 and 40,000 contacts. The number of users per charity for concurrent use on the application will range between approximately 2 and 15 users.
2. Development of the databases with new business requirements. The product should be flexible to keep up with the demand of the changing environment.
3. These databases are to be hosted and managed on virtual servers in the [REDACTED]. There is a requirement to manage the databases within this environment, including security patching, updates and security monitoring.
4. Training Users on the use of the Database
5. Service provider admins must be SC
6. Work with Army Digital Services with the delivery, security and maintenance of the Databases.
7. Management of Virtual Portal databases or APIs that connect members to their data in the Databases.

Excluded:

Hosting

### Requirements

The requirement is for a fully integrated Customer Relationship Management Tool (CRM), compliant with the Data Protection Act 2018 (DPA18) and [REDACTED] and the [REDACTED] principles, to improve the communication with, management of, and support to Service Personnel (Regulars and Reserves), veterans and families (including the bereaved).

## OFFICIAL-SENSITIVE COMMERCIAL

The CRM will sit on MOD governed Azure cloud servers and so it must be accessible on internet facing systems and must have the ability for member of the Corps family to create and manage their own accounts and personal details from outside the secure environment via secure gateway.

### **Where.** Delivery / location of services

1. Within the MODCloud's Virtual environment. [REDACTED]
2. To be accessed via an OpenVPN/[REDACTED] from the client machines.

**Start Date :** ASAP

**Completion Date:** TBC

**Duration:** 4 Years plus 2 Option Years

**Acceptance criteria:** Acceptance will be given once all connectivity, data and specialised elements of the CRM have been delivered.

**Acceptance Process:** Fully tested access and acceptance that data has been fully converted and migrated without any loss of integrity.

### **Performance Required outputs:**

**Performance measures:** Accuracy and Availability to be maintained at all times with minimum downtime of 1 day for emergency work. 1 week for major incident.

### **Targets to be met:**

**Management of the contract:** Centralised for all Corps and to be done through HQ R SIGNALS and Head Arms and Service on an annual review. [REDACTED]

### **Service Level Agreements in reality included in contract and maintenance schedule:**

- Support on the use of CRM after initial training
- Updates to CRM
- Crystal Report creation (fair use)
- Online knowledge base
- Support delivered by: • Telephone • Email • Remote access support (e.g., TeamViewer, Teams, Zoom) • Online knowledge base Support hours • Between 09:00 and 17:00 (GMT/BST) Monday to Friday (excluding national holidays)
- CRM support – within 4 hours
- Crystal Reports – within 2 working days
- [REDACTED]
- [REDACTED]

### **There will be a requirement for the following activities:**

- Migration of data from one platform to another.
- Data conversion and/or data import
- On-site visits.
- Consultancy.
- Analysis of business processes.
- Training beyond initial training.

OFFICIAL-SENSITIVE COMMERCIAL

- Virtual/physical attendance at meetings.
- Emailing issues outside of SubscriberCRM and its email client. Modifications to add-ons, e.g., MailChimp integration, (unless where stated otherwise).
- Modifications to custom processes, e.g., any automatic overnight processes (unless where stated otherwise).
- A CRM Portal or API support.

*Additional Information from requirements*

Use on an existing hosting platform is required, so any solution must sit in that environment and must be [REDACTED], Data Protection Act 2018 (DPA18) and [REDACTED] and the [REDACTED] principles compliant.

**Outputs/deliverables/milestones**

- The Supplier is to convert and migrate all data from each Corps Charity that has requested the capability onto the MODCloud [REDACTED] environment within the project time scales that will be agreed by both parties.
- Location of the work is via remote access into [REDACTED] environment.

**During delivery The Supplier will:**

- Provide support and training on the use of the application.
- Development work required.
- Provide support to ensure a smooth transition.
- Technical support is to be provided by Army digital Services to facilitate the build and access to remote servers.

**Acceptance**

Acceptance testing period will be required to ensure every aspect of the CRM works within the environment of each charities business needs.

**Intellectual Property (IP) Rights (Known as IPR)**

N/A

**Government Furnished Supplies**

N/A

**Approach (optional and only in exceptional circumstances)**

N/A

**Payment**

Payment will be made within 30 days of receipt of invoice.

**Contract management arrangements**

Contract will be reviewed annually 4 weeks before renewal date.  
Performance will be measured by availability and useability of the product.

**End of contract/Exit strategy**

Working in tandem with a new contractor for a period for a smooth transition of data to the new database.