

ANNEX A : CUSTOMER'S PROJECT SPECIFICATION

1 SCOPE OF REQUIREMENT

- 1.1 The Customer shall herein be referred to as the 'Authority'.
- 1.2 The aim of the Customer Segmentation Research is to increase the Authority's understanding of (and differentiation between) its customers and how they access and utilise UKVI services.
- 1.3 This shall assist the Authority develop a customer strategy, which will define the Authority's future offer and channels.
- 1.4 All individual customers, for whom a recent visa or immigration decision has been made, are in scope. This shall include customers from different parts of the world.
- 1.5 UKVI customers that need to be included in the research are:
 - 1.5.1 Individuals that are coming to visit the UK
 - 1.5.2 Individuals that are coming to study in the UK
 - 1.5.3 Individuals that are coming to work in the UK
 - 1.5.4 Those who want to settle in the UK
 - 1.5.5 Family/Human Rights cases
- 1.6 Please see link on published UKVI migration data for background: <https://www.gov.uk/government/collections/migration-transparency-data#uk-visas-and-immigration>
- 1.7 The Authority has access to internal databases (through the Performance, Reporting & Analysis Unit - PRAU) which can be used for sample for this research and the Supplier shall have access to this data.
- 1.8 The database holds a high volume of customers contact details. By way of example for the month of February 2018, UKVI's global customer satisfaction survey was emailed to 140,000 overseas customers and 24,000 in-country customers for whom we held an email address and a visa decision was made during the past month.
- 1.9 In addition, for in-country customers the Authority held 18,000 contact telephone numbers in February 2018.
- 1.10 Demographic information that the Authority holds includes:
 - 1.10.1 Name
 - 1.10.2 Date of Birth
 - 1.10.3 Nationality
 - 1.10.4 Email address
 - 1.10.5 Phone number
 - 1.10.6 Applicant addresses (current and past for in country but only most recent for out-of-country)
 - 1.10.7 Details of representatives acting on the applicants' behalf
 - 1.10.8 Application type
 - 1.10.9 Date of application
 - 1.10.10 Date of decision(s) (cases might be reconsidered)

- 1.10.11 The decision(s)
- 1.11 The system available to the Authority captures demographic data for sponsors, which may be used as a means of understanding the needs and behaviours of applicants who use this route, through the eyes of the sponsor. Demographic data for sponsors includes:
 - 1.11.1 Sponsor name
 - 1.11.2 Addresses
 - 1.11.3 Email address
 - 1.11.4 Phone number
 - 1.11.5 Key contact and Authorising officer details
 - 1.11.6 Size of organisation (based on # employees)
 - 1.11.7 Tier 2 and 4 sponsors
 - 1.11.8 What professional bodies they are associated with
- 1.12 **Out of Scope**
 - 1.12.1 The research reports shall not encompass the following individual customers:
 - 1.12.1.1 Asylum
 - 1.12.1.2 Resettlement

2 THE REQUIREMENT

- 2.1 The Supplier shall provide a language and translation service to the Authority. Where non-English evidence is cited, the Supplier shall provide full translations in English and quality assure the accuracy of any translations to English.
- 2.2 The Supplier shall deliver the following;
 - 2.2.1 Desk-based review of relevant documents to help inform sampling strategies and fieldwork approach
 - 2.2.2 Develop the appropriate research instruments, incorporating the Insight team feedback
 - 2.2.3 Design the sampling strategies, incorporating the Insight team input
 - 2.2.4 Undertake the research activities with key customers – outlined in section 5.4 including fieldwork and analysis
 - 2.2.5 Provide all reporting
- 2.3 The Customer Segmentation research reports created by the Supplier shall detail what attitudes, behaviours, needs and characteristics differentiate between customer segments based on their interactions with the Authority, and in particular:
 - 2.4.1 How they prefer to access services (in general)
 - 2.4.2 What features of services they find challenging
 - 2.4.3 What services they expect
 - 2.4.4 What premium and priority services they expect and what they are likely to pay for them (broadly)
 - 2.4.5 How they prefer to communicate with service providers
 - 2.4.6 How digitally enabled are they
 - 2.4.7 What the main drivers of satisfaction are for each segment

- 2.4.8 What factors have a negative impact on satisfaction
- 2.5 The Supplier shall provide a representative breakdown of customers by age, gender, region, type of visa is required as well as including the following customers:
- 2.5.1 Individuals that are coming to visit the UK
 - 2.5.2 Individuals that are coming to study in the UK
 - 2.5.3 Individuals that are coming to work in the UK
 - 2.5.4 Those who want to settle in the UK
 - 2.5.5 Family/Human Rights cases
- 2.6 **Sampling Requirements**
- 2.7 The Supplier shall produce the following outputs (in both paper and electronic formats) for each stage:
- 2.7.1 Detailed project plan, outlining key dates and milestones, and clearly indicating any actions for the Authority;
 - 2.7.2 Weekly progress updates, including survey response rates for the quantitative stage;
 - 2.7.3 Datasets of all survey waves in a format agreed with the Authority
 - 2.7.4 A copy of the questionnaire, discussion guides and all research reports and presentations
 - 2.7.5 Short briefing note and summary tables after each stage (if appropriate)
 - 2.7.6 Short final research report summarising the findings
 - 2.7.7 A PowerPoint presentation of findings including a face-to-face debrief of results.
- 2.8 **Timings**
- 2.8.1 The research project is likely to begin early May and needs to be completed by the end of September 2018.

3 KEY MILESTONES

- 3.1 The Supplier should note the following project milestones that the Authority shall measure the quality of delivery against:

Milestone	Description	Timeframe
1	Project Commencement	Within week 1 of Contract Award
2	Project set-up meeting at REDACTED	Within week 1 of Contract Award
3	The Authority to supply access to PRAU customer data and relevant internal background and documents	Within week 1 of Contract Award
4	Internal stakeholder meetings / deep dives	Within week 3 of Contract Award
5	Segmentation debriefs	Within week 18 of Contract Award

4 AUTHORITY'S RESPONSIBILITIES

- 4.1 The Authority shall share samples taken from the PRAU database for the purposes of interviewing and be responsible for providing this to meet the timings of the project.
- 4.2 The Authority shall share any relevant previous research or literature upon commission to inform the Provider's approach.
- 4.3 Where necessary, the Authority shall provide aid to support the delivery of this requirement including guidance and information to provide high quality outputs.

5 REPORTING

- 5.1 The research project is likely to begin early May and needs to be completed by early September 2018.
- 5.2 Progress reports on the project, including progress against the timetable and survey response rates are required on a weekly basis.
- 5.3 Research findings in the format of a word document are required at the end of each stage as outlined in section 6.9.
- 5.4 On completion of all stages, the Supplier must provide a PowerPoint presentation of findings, including two face-to-face debriefs of results in London or Croydon. This should include pen portraits of the segments identified.
- 5.5 If applicable, full transcripts should be provided along with any video footage, and raw data should be provided in Excel or as a csv file.
- 5.6 Survey datasets shall be delivered in a format agreed with the Home Office upon completion of the project.

6 CONTINUOUS IMPROVEMENT

- 6.1 The Supplier shall be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration through an iterative process of learning from each stage of the research.
- 6.2 Changes to the way in which the Services are to be delivered must be brought to the Authority's attention and agreed prior to any changes being implemented.

7 QUALITY

- 7.1 Suppliers shall abide by the Market Research Society (MRS) code of conduct.
- 7.2 The Authority requires the Supplier to detail the Quality Assurance process, including but not limited to, clear evidencing of sources.
- 7.3 The Authority reserves the right to examine any aspect of the successful Providers work in detail, or to commission suitable agents to do this.

8 PRICE

- 8.1 The maximum budget for this research is £150,000, excluding VAT.

9 STAFF AND CUSTOMER SERVICE

- 9.1 The Authority requires the Supplier to provide a sufficient level of resource throughout the duration of the Authority's Customer Segmentation Contract in order to consistently deliver a quality service to all Parties.

- 9.2 Supplier's staff assigned to the Customer Segmentation Contract shall have the relevant qualifications and direct experience in Segmentation studies to deliver the Contract.
- 9.3 The Supplier shall ensure that staff understand the Authority's vision and objectives and shall provide excellent customer service to the Authority throughout the duration of this Contract.

10 SERVICE LEVELS AND PERFORMANCE

The Authority shall measure the quality of the Suppliers delivery by the following:

KPI/SLA	Service Area	KPI/SLA description	Target
1	Service Delivery	Adherence to key milestones and associated timings	100%
2	Report Delivery	Delivery of weekly progress updates on number of achieved responses	100%
3	Report Delivery	Delivery of a research report at the end of each stage as outlined in Section 6.	100%
4	Report Delivery	Delivery of final PowerPoint debrief presentations	100%

- 10.1 In the event of poor performance through the failure to deliver KPIs to time and of appropriate quality, the Authority shall meet with the Supplier to understand the root causes of the issue. The Supplier shall formulate a Performance Improvement Plan to rectify these issues and meet the requirements in this statement.
- 10.2 If poor performance continues, following formal written warnings, early termination of the Contract shall also be considered.
- 10.3 The Authority shall monitor the work of the Supplier throughout the project through regular contact between the Supplier and The Authority's day-to-day contact.
- 10.4 The Authority shall manage poor performance by the Supplier as set out in 10.1, 10.2 and 10.3.

11 SECURITY REQUIREMENTS

- 11.1 The Supplier shall attend meetings in REDACTED and will be asked to go through the standard security checks before entering the building.
- 11.2 The Authority requires the secure data from the Supplier to be transferred via encrypted files and/or a secure network.
- 11.3 Prior to the award of the contract, the Supplier shall complete and return a Non-Disclosure Agreement (NDA) to the Agent. Once received, the contract shall be awarded.

12 INTELLECTUAL PROPERTY RIGHTS (IPR)

- 12.1 The Authority shall own and retain all intellectual property rights arising from this Customer Segmentation Research.
- 1.2 The Authority intends to use the data primarily to inform Customer Strategy and for identifying sample for future research projects.

13 PAYMENT

- 13.1 Payment is required as follows:
- 13.1.1 35% upon successful commission of the project

- 13.1.2 30% at the mid-point of the project (30th June 2018)
- 13.1.3 The remaining 35% upon successful completion and delivery of the project
- 13.2 Payment can only be made following satisfactory delivery of pre-agreed certified products and deliverables.
- 13.3 Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.
- 13.4 Invoices shall be sent to the following address;
 - 13.4.1 Home Office Shared Service Centre,
HO Box 5015,
Newport
NP20 9BB

14 LOCATION

- 14.1 The location of the Services shall be carried out at one of the below locations;
REDACTED