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| Invitation to Tender |

MICROSOFT ERP & CRM SOFTWARE IMPLEMENTATION PROJECT

DUKERP BIG2081

Version Control

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| --- | --- | --- |
| Version | Date | Description |
| 1.0 | 09/03/2017 | Tender document creation with requirements |

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Contents

[1 Background/Introduction 3](#_Toc474747013)

[2 Project Specifications 4](#_Toc474747016)

[3 ITT Timetable 5](#_Toc474747017)

[4 Conflicts of Interest 5](#_Toc474747018)

[5 Consortium or sub-contracting 6](#_Toc474747019)

[6 Tender Application Requirements 6](#_Toc474747020)

[7 Supplier response 6](#_Toc474747021)

[8 Tender Evaluation 8](#_Toc474747023)

[9 Tender Returns](#_Toc474747024) 9

[10 Clarification 9](#_Toc474747025)

[11 Disclaimer](#_Toc474747026) 10

[12 Enclosures](#_Toc474747027) 10

1 Background/Introduction

Datasharp UK Ltd (‘Datasharp’ from here on) has been in operation for 35 years and is still a family run company. Datasharp pride themselves on service and excellence in providing bespoke telephone solutions and IT solutions to business customers across the UK

Datasharp recently expanded its team into a second premises in Truro Business Park to accommodate its expansion into IT Services and Support. Datasharp benefit from the talent located in Cornwall and across the South West, and the new premises with custom built test and development areas ensure Datasharp can continue to provide its customers with a superior level of care.

In 2016 Datasharp was recognised by Microsoft as being ranked in their Top 5% of Network Partners globally. This recognition follows Datasharp’s latest accreditation for “Small and Midmarket Cloud Solutions” for implementing and supporting Microsoft’s cloud services, in particular Microsoft Office 365. This recognition is testament to the fact that Datasharp are dedicated to remaining at the forefront of technology for the benefit of its customers.

Datasharp currently uses a combination of Sunrise service management and Access Dimensions accounting systems to help run its business. Datasharp’s believes the current systems are unable to support the business’ growth plans and has decided to replace them with a fully integrated Microsoft Dynamics ERP and CRM software solution.

Datasharp requires a single provider of services to assist and manage the implementation of Microsoft Dynamics 365 (Enterprise Edition). This need arises due to company growth and to enable Datasharp to provide even better services to its customers, and with the long-term future in mind.

## Company description and profile

Please see:

Enclosure 1: *Welcome to Datasharp.pdf*

Our website: [www.datasaharp.co.uk](http://www.datasharp.co.uk)

## Overview of project requirements and scope

The project scope is for the provision of services to implement a Microsoft Dynamics 365 solution at Datasharp, covering all aspects of the company, including:

* Sales & Marketing
* Customer Service Delivery – remote, field and internal
* Procurement, stock and order processing
* Finance and Administration

For more information of the above requirements please refer to Enclosure 2: *Datasharp Pre-Scoping Requirements.*

The implementation will be a comprehensive replacement of the many applications, tools and processes currently used at Datasharp. The project will be complex and will require a team of highly skilled, experienced, practical and well-coordinated individuals employed by one service provider. This team will work closely with Datasharp to see the successful project through, with tight cooperation and liaison between both organisations.

After extensive analysis of requirements and detailed research into software products we have established the following overall requirements:

* As a Microsoft Gold Partner Datasharp will be using Microsoft Dynamics 365 software for this project. It is likely that we will procure this directly but we welcome cost estimates for the anticipated licence requirements.
* The project must be carried out and managed by a single supplier, without involving sub-contractors, ‘partners’ or other companies within a consortium.
* We require the project team of the selected supplier to have extremely good knowledge and practical experience with successful implementations of Microsoft ERP and CRM software, including Field Service and Project Service Automation.

The objective is to complete the implementation of the software during the Summer of 2017.

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 as a whole. We will award the contract to the lowest compliant bid.

2 Project Specifications

In the requirements documents listed in Enclosure 2 we have mapped out the functional areas of our business in a way that is not dependent on the current structure of Datasharp’s business and its departments. The diagram is a definition of each part of the business operation that will combine to produce a full and comprehensively integrated whole system, using the methods built into the new software. The second document is list of currently known requirements based on that diagram and prior to a full scoping exercise at the start of the project.

This implementation will include:

* Installation
* Scoping & Design
* Configuration
* Development (where required)
* Integration and data migration between existing or new elements
* Testing and pilots
* Commissioning and User Acceptance
* Project Management

Your response should clearly demonstrate how the application of Microsoft Dynamics 365 Enterprise with Operations (AX) and CRM along with the required configuration services, meets or exceeds the requirements as specified in the Enclosure 2 documents.

3 ITT Timetable

The anticipated timetable for submission of the tender and commission milestones are set out below:

|  |  |
| --- | --- |
| Activity | Date |
| Date ITT available on Contracts Finder | 13th March 2017 |
| Last date for raising queries | 20th March 2017 |
| Last date for clarifications to queries | 27th March 2017 |
| Deadline to return ITT | 3rd April 2017 |
| Evaluation of ITT | 7th April 2017  |
| Award of Contract  | This is subject to successfully obtaining grant funding and will normally be no later than 90 days from contract evaluation |

4 Conflicts of Interest

Please provide a statement with regards to a conflict of interest for this procurement through the provision of either:

A Declaration that to your knowledge there is no conflict of interest between your company and Datasharp 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 their impartiality and independence in the contexts of this procurement procedure.

Or:

A Declaration that there is a likely conflict of interest between your company and Datasharp 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 their impartiality and independence in the contexts of this procurement procedure, please provide details of this connection.

This will permit Datasharp, in the event of a conflict of interest, to take appropriate steps to ensure that the evaluation of any submission will be undertaken by an independent and impartial party.

**Exclusion**

Datasharp shall exclude applicants from participation in this procurement procedure where they have established or are otherwise aware that the applicant, to include administrative, management or supervisory staff that have powers of representation, decision or control of the applicants company, has been the subject of a conviction by final judgment of one of the following reasons:

Participation in a criminal organisation

 Corruption

 Fraud

 Terrorist offences or offences linked to terrorist activities

 Money laundering or terrorist financing

Child labour and other forms of trafficking in human beings

5 Consortium or sub-contracting

The project must be carried out and managed by a single supplier, without involving sub-contractors, ‘partners’ or other companies within a consortium. All information requested should be given in respect of the proposed contractor.

6 Tender Application Requirements

Please provide pdf files of your application which should include:

1. Confirmation that you the supplier are able to meet the requirements outlined in the brief
2. The following reference must be included in any correspondence:DUKERP BIG2081. In particular, this reference must be used in the subject of any email.
3. Details of who to contact in your company in relation to this tender
4. Company registration Number and VAT number (if appropriate)
5. A comprehensive proposal demonstrating your understanding of Datasharp’s requirements and how a Microsoft Dynamics 365 solution can be successfully implemented based on the requirements and scope documentation provide in Enclosure 2 with associated costs. The proposal must provide the information in the format as outlined in Section 7 – Supplier Response

# 7 Supplier response

This section describes the information and format that suppliers are requested to follow when responding to this ITT. Suppliers should refer to Enclosure 2 and use the following headings when providing their responses.

## Executive summary:

Suppliers are asked to provide the following:

* Company overview, Microsoft Dynamics 365 credentials and suitability for Datasharp’s project
* Cost summary; broken down by initial and recurring costs plus details of any additional expenses likely to be incurred by Datasharp
* High level project plan illustrating delivery timeframes

**Meeting Requirements**

Supplier should review Datasharp’s requirements supplied in Enclosure 2 and provide a response which clearly demonstrates your understanding and ability to meet our requirement. Specifically explain in detail how Dynamics 365 will be used to meet the following stated business requirements.

* Explain how AX will provide the nominal / transaction detail required by Datasharp.
* Explain how the time recording would work from a transaction level and from the user's point of view
* Explain how the resource scheduler would work from a user’s point of view.
* Explain how would a supervisor have visibility of what engineers are working on in real time before a case is closed
* Explain the functionality of the customer portal to enhance Datasharp's operation and provide screen shots of what the customer portal will look like
* Explain the use of any proposed integration middleware

**Delivery Approach**

* Confirm how you would engage with Datasharp to define our detailed needs.
* Describe your engagement approach that, as a minimum, will result in the deliverables specified
* Define the roles and qualifications, skills and experience of the assigned staff to Datasharp’s project
* The project must be started no later than 1st June 2017 and be completed to Go Live within 9 months.

**Implementation Services**

State the estimated service days to be performed for each of the following tasks:

* Project Initiation
* Installation
* Scoping /Functional Solution Design
* Technical Solution Design
* Entity Configuration
* Functional Development
* Integration Development
* Administration
* Data Migration
* User Acceptance Testing (UAT)
* Go Live

**Commissioning**

* State how the system is to be commissioned onsite.

**Support Services**

* Confirm your approach to customer success/account management and helpdesk capabilities with details of SLAs
* Provide costs for ad hoc support as distinct from a pre-charged, on-going support agreement

**Company Overview**

Suppliers are also asked to answer the following questions:

* The date the company was established and how long the company has been in existence in its current form
* Approximate company turnover for each of the past three years
* The total number of relevant technically qualified staff, their relevant position to this tender

and their worldwide location

* The location of the company's main offices; the location of the office that would provide technical support (if that is different)
* Provide a copy of the supplier’s professional indemnity or similar insurance, the supplier must have cover of a minimum of £5million cover.
* Provide evidence that it has experience working with similar organisations to Datasharp and implementation AX and CRM projects as joint and as individual products, where the CRM elements have been greater than 250 man days’ implementation.
* Provide evidence that it is an established Microsoft Dynamics Gold Partner for ERP and CRM with at least 10 years’ track record of implementing both Dynamics AX and Dynamics CRM solutions.
* Provide evidence that it is has provided long term support for both Dynamics AX and Dynamics CRM solutions being support contracts with a minimum of 3 years continued duration.
* Provide a copy of the service level agreements for both the project delivery and ongoing support which detail that, if Datasharp notifies a requirement for the supplier to attend our site by 12:00 the supplier will attend site no later than 09:00 the following business day and if Datasharp notifies a requirement for the supplier to attend our site by 17:00 the supplier will attend site no later than 12:00 the following business day.
* Case Study - details of a recent implementation similar in profile to Datasharp
* References – details of three relevant references that we may contact

**Costs**

Suppliers are asked to detail the cost to provide this project detailing the following information:

* On Site Days:
	+ Total number of days on site
	+ Total cost of onsite days
	+ Additional expenses charged for onsite days
* Off Site Days:
	+ Total number of days off site
	+ Total cost of offsite days
* Total project cost (sum of the above cost values)

8 Tender Evaluation

Datasharp has committed to make substantive investment in a Microsoft Dynamics 365 system to improve the efficiency of the organisation to support growth.

The sponsor of the Dynamics 365 Project is the Managing Director, Jane Cockcroft, supported by a steering committee. The steering committee will select the preferred supplier.

The tender will be awarded to the lowest compliant bid.

9 Tender Returns

Tenders may be returned by e-mail or post, or by delivery in person.

Tenders are to be returned by: 3rd April 2017

Latest date to be returned: 3rd April 2017

Latest time to be returned: 23:59 (UK time)

If submitting by **e-mail,** tenders should be sent electronically to ***paul.hayes@datasharp.co.uk*** with the following message **clearly noted in the Subject box:**

*TENDER -**Microsoft ERP & CRM Software Implementation Project DUKERP BIG2081*

E-mail submissions should not give any indications as to the tenderers identity. A business name identified via e-mail address will not disqualify the tender. The receipt of documents using this format is the tenderer’s responsibility.

Tenderers are advised to request an acknowledgement of receipt when submitting by e-mail.

If submitting by post or in person, the Tender must be enclosed in a sealed envelope, only marked as follows:

*Tender - Strictly Confidential – Microsoft ERP & CRM Software Implementation Project DUKERP BIG2081*

Contract Reference Number: BIG2081

Addressed to:

Paul Hayes

Head of Finance

Datasharp UK Ltd

Woodlands Court

Truro Business Park

Truro

Cornwall TR4 9NH

The envelope should not give any indication to the Tenderer’s identity. Marking by the carrier will not disqualify the tender.

If delivery **by hand** please obtain an official Receipt at point of delivery

10 Clarification

There will not be any negotiations of any of the substantive terms of the Tender Documents. Only clarification queries will be answered. Any clarification queries arising from the Tender Documents which may have a bearing on the offer should be raised as soon as possible in writing. The deadline for clarification questions to be raised is 20th March 2017. All e-mailed queries should be sent to:-

Name: Robert Gillett

E-mail: robert.gillett@datasharp.co.uk

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 us unless such representation is in writing and duly signed by Jane Cockcroft of Datasharp. All such correspondence shall be returned with the Tender Documents and shall form part of the Contract.

Tenderers must provide a single point of contact in their organisation for all contact between the Tenderer and Datasharp.

Responses to any queries will be shared through Contracts Finder website.

11 Disclaimer

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

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

Bidders shall be responsible for their own costs and expenses in connection with or arising out of their response. Datasharp 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 Datasharp liable for any costs or expenses incurred by bidders during the procurement process.

12 Enclosures

## Enclosure 1 - Welcome to Datasharp.pdf

Please refer to the following companion file:

*Welcome to Datasharp.pdf*

## Enclosure 2 - Datasharp Pre-Scoping Requirements

*Annex A Datasharp high level* business *mapping:* Functional business areas relevant to the project

*Annex B Datasharp Pre-Scoping Requirements*: List of the requirements details of each of the functional areas described earlier.

*Annex C Management Accounts report requirements example*: Example spreadsheet report referred to in *Datasharp Pre-Scoping Requirements*. - See Business Support section > Nominal Ledger > Tiered Categorisation (BS.3.3.4.2).

*Annex D Datasharp example scoping for prospective vendors of AX & CRM services*: Sample scoping of requirements for three key areas to be covered. Note that this is just a sample to aid prospective vendors’ understanding of some parts of the proposed new system.