

## **New Anglia Local Enterprise Partnership**

### **Invitation to tender**

### **“For design and provision of an online Customer Relationship Management System ” December 2016**

#### ***Introduction***

This invitation sets out the requirements for the delivery of an online Customer Relationship Management System CMS which provides our growth hub and partners in the New Anglia Local Enterprise Partnership (LEP) area (Norfolk and Suffolk) with access to a CMS solution framework and the relevant licences.

The work is being commissioned by New Anglia LEP, as part of its activity to deliver its Business Growth Programme, including the New Anglia Growth Hub and its partners.

#### ***Background***

New Anglia Local Enterprise Partnership was established by Government in 2010 as a business-led collaboration between the private, public and education sectors across Norfolk and Suffolk. As one of 39 LEPs across England, our ambition is to drive economic growth and transform the local economy into a global centre for talent and innovation. New Anglia LEP represents one of the fastest growing regions in the country, with 1.6 million people and around 55,000 businesses.

The New Anglia Growth Hub and its partners require a new CMS to replace the existing one to meet the funding requirements and stakeholders needs for reporting information that will measure intervention impact and monitoring of business growth in the Norfolk and Suffolk counties on a shared platform. Included in this tender is the cost of transference of all existing data to be from the current free Sugar CRM system onto the new system and from partners systems, which includes Evolutive (Alcium Software).

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### ***Project description***

New Anglia LEP requires experienced consultants to design, provide and implement a CMS, which will provide a solution framework to enable the growth hub and other users to be up and running with minimal fuss and configuration of the CMS. The descriptions below detail the core elements required of the solution and the need to port data from the growth hubs existing system.

It should be capable of providing the ability to store information regarding Companies with the ability to capture core data requirements for growth hubs and partners including district and county councils and other delivery partners such as enterprise agencies. This will require the system to be adaptable and respond to the natural evolution of the needs of the growth hub, grant providers, partners and other programmes. It will have the reporting capability and the capacity to upscale and adapt to changing campaigns and funding requirements.

The Account record must have the ability to be assigned a specific Account Manager and capable of recording information on Account Status, engagement dates plus any other total outcomes such as the number of jobs created or grants applied for and received, time spent with clients, review and reminders and at some point the capture of customer satisfaction.

The CMS licences will also be required.

### ***Project management and monitoring***

The project will be managed by New Anglia LEP and delivered by New Anglia Growth Hub and accessible by our partners and stakeholders. For the duration of the tender, the preferred supplier will be required to work with and liaise with a project team, made up of a range of partners taken from the New Anglia Growth Programme Partnership Board, including New Anglia LEP, council representatives and New Anglia Growth Hub.

### ***Timescales and milestones***

- Proposals should be with New Anglia LEP by **5pm Friday 20<sup>th</sup> January 2017**
- Work must have started on the design and development of the platform by **6<sup>th</sup> February 2017**.
- The platform must be operational and meet the specifications outlined in this tender brief by **31<sup>st</sup> March 2017**.

### ***Tender process***

Applicants will be selected for shortlist based on their initial tender submissions, with shortlisted applicants being invited to pitch their proposals to a panel during January 2017.

Applicants will be shortlisted and selected on the basis of selected based on their ability to: -

- Be in a position to begin the contract on or before the **6<sup>th</sup> February 2017** and complete it by the **31<sup>st</sup> march 2017**.
- Have previous experience of developing and delivering projects of a similar nature, with evidence of the success of these projects.
- Clearly demonstrate that they can meet all the specifications and requirements outlined in this tender document.

### ***Budget***

- A budget of up to £25,000, including VAT is available for the delivery of this activity

### ***How to apply***

Please send the following information electronically to Julie West at New Anglia LEP by **5pm Friday 20<sup>th</sup> January 2017**: -

- Details of how you will develop and deliver the contract within the specification, cost, and timelines outlined in this brief.
- Evidence of your experience in delivering projects of a similar nature, with evidence of the success of these projects.
- References of three organisations that you have undertaken this type of work for in the last three years.
- A detailed breakdown of the costs of developing and delivering the CMS.
- Details of risks associated with the design and delivery of the project, including details of how you will comply with all current and future data protection regulations and guidelines.

***Main contact***

Julie West

Programmes Coordinator

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## Executive Summary

### Overview

- New Anglia Growth hub and partners requires a new CMS to replace the existing service to monitor the New Anglia Growth Programme activity to meet the funding requirements and stakeholders needs for reporting information that will measure intervention impact and monitoring of business growth and tracking grants in the Norfolk and Suffolk counties. It would need the ability to offer a bespoke template for bi-monthly newsletters for instance  
[http://suffolk.evolutive.co.uk/store/documents/standard/38090\\_79ctv9ke2lluhx3o.html](http://suffolk.evolutive.co.uk/store/documents/standard/38090_79ctv9ke2lluhx3o.html)  
)

The CMS solution requested will provide a solution framework to enable the growth hub and partners to be up and running with minimal fuss and configuration of the CMS. The descriptions below detail the core elements required of the solution and the need to port data from our existing system.

It should be capable of providing the ability to store information regarding Companies with the ability to capture core data requirements for all parties. This will require the system to be adaptable and respond to the natural evolution of the growth hub. It will have the reporting capability and the capacity to upscale and adapt to changing campaigns.

The Account record must have the ability to be assigned a specific Account Manager and capable of recording information on Account Status, engagement dates plus any other total outcomes such as the number of jobs created or grants applied for and received, time spent with clients, review and reminders and at some point the capture of customer satisfaction.

Linked to all Accounts are the Referrals (**Enquiries**) on which Account Managers are working on with the business (and Outcomes already achieved by Referrals).

Each referral must be linked to a single business and for a single support provider. Within the referral, the Account Manager can log activities against the business.

Outcomes also form part of the Referral record, and these are used to track all outcomes from the engagement to log information such as job creation, grants or unique strand information such as Innovation grants, in essence the whole client experience of the journey.

In addition, the system must be able to link all Accounts to Action Plans (these are umbrella records and very similar to a Referral/Enquiry) on which Account Managers are working on with the business (and one or more Outcomes to be or already achieved by Action Plans with prompts for review).

NB: Action Plans are a way of separating individuals or different strands or support programmes/projects work into a headline record. Each action plan is linked to a single business and owned by one individual. Within the Action Plan the Account Manager can log activities against the business, which can include the monitoring of grants through to

completion. Each CMS Activity such as E-mail, Phone call, task etc. has a duration field and once these are completed, the solution will add the total to the Duration field on the form. This duration field itself will be used to update the total Account Managers cumulative Assist time on the Account.

Underneath each Action Plan are sub indicators (Outcomes) and these will be used to assess the success of the Account Manager's activities.

The Outcome record is used to track all responses from the engagement to log information such as adviser time utilised, job creation, grants or unique strand information such as Innovation grants.

Ability to act as a comprehensive grant management system, from initial enquiry, through application and due diligence stages, to approval, formal offer, and recording of contractual outputs and quarterly claim processes until regarded as complete. To include ability to diarise and prompt at each stage, and storage of key grant documents and client notes. (Smartsheet is currently used as our grant management system).'

If possible add for instance a Property selection–PropertyLink <https://propertylink.estatesgazette.com/>) which is currently offered as part of the Evolutive cms and appears on selected websites (<http://investinsuffolk.com/land-and-property-search/search-for-properties/>) enabling a commercial property search.

Other customised areas needed within the solution to support Growth hub and partners processes include:

**SIC codes** – lookup from Account form to SIC codes and description (the data to the level NA Growth hub and partners utilise will be provided for this)

**GVA** – to monitor company performance post Growth hub and partner's intervention

**Time** – adviser time spent with a client

**De Minimis** – To track funding an organisation has previously received

**Activities** – such as appointments, phone calls, emails, tasks will be tracked against an action plan

**Contacts** – Any Contacts related to an Account or Activity

**Ethnicity** – from a prescribed list

**Age of client** – from a prescribed list

**Contact Questionnaire** – tablet friendly questions to help drive the initial conversation with new contacts

**Digital (electronic) signatures** – where tablets are used to collect data

The solution must come complete with custom code that will calculate totals from Referral Outcomes and Actions Plans into a summary of information on the Account form

The user interface and site map should be configured to provide only the functionality required by growth hub and partners users.

## The Business Processes

### Account Catch up Tasks.

When new Accounts are created follow up tasks after a set review point is created for Account Managers.

### Account Management First Engagement.

If a staff member enters a Lead they can enter this into CMS as the owner first but then assign that Account onto an Account Manager. Account Managers will then be given a CMS Task to make a first engagement within a few days. Once this activity is completed the system will automatically update the Account engagement date and change the status from Lead to Engaged using a business process.

These activities can be cancelled and the Accounts remain as Leads with no engagement date in case they are unsuccessful in making contact.

The above are examples of existing workflows in the existing system, any new CMS solution should provide an extensive scalable and responsive workflow capability, that can be built using a simple user interface for super users of the system, to provide additional processes for the Growth Hub and partners such as sending an email to individuals 6 months after an Account is created, to carry out follow up activities.

## Dashboards and Reports

The solution should include a number of bespoke reports and dashboards for example:

### Reports

Grant Pipeline

Referrals Pipeline

Dashboards:

Delivery Dashboard

Management Dashboard

Outcome Dashboard

Quarterly Performance Dashboard for ERDF schemes

Monthly Performance Dashboard for LEP/District/Authority reporting

### Mail Merge

The system must be set up to allow Mail Merge documents to be easily created from the Action Plan record with information of activities readily available to merge into a custom template that is tablet and mobile friendly.

Standard MS Word mail merge integration should be used to create documents using a connection to the CMS database. Encryption handshakes should be standard.

### Charts

The Account record should generate a number of bespoke charts to showing a subset of data as defined by some set criteria such as:

- Account By Owner
- Account By Industry
- Breakdown by Area
- Breakdown by District/Local Authority
- New Accounts by Month

### Security Role

The Growth hub and partners solution must provide a custom security role designed to enable users to complete all activities easily and to ensure all business information is available to everyone that needs it, to provide the best possible service towards businesses in the region, integrated with encryption. CMS access must be manageable in terms of access to functions, including but not limited to: read only, report, edit, amend and delete.

### Integrated Marketing Automation

NEW ANGLIA GROWTH HUB currently make use of the Campaign Manager email marketing service to send bulk email marketing to prospective customers. It is expected that a level of marketing automation will be required as part of the proposed New CMS solution and, as such alternatives may be suggested.

### Support training

It is anticipated that support training will be required by the NEW ANGLIA GROWTH HUB AND PARTNERS MI team and will form part of the installation process.

### Requirements Overview

Requirement	Solution
<b>NEW ANGLIA GROWTH HUB AND PARTNERS require a secure, reliable and accessible solution.</b>	

<b>Access must also be available to mobile devices. Tablet (landscape mode) is fundamental, Mobile 'phone (portrait) is desirable.</b>	
<b>Access to third party users is a 'must have' requirement, although this may have to be restricted (see security role)</b>	
<b>Any evaluated solution should meet industry standard requirements ISO 27001.</b>	
<b>Both Cloud and Hosted options could meet NEW ANGLIA GROWTH HUB AND PARTNERS's requirements. Both cloud and hosted options have differing pros/cons but could meet NEW ANGLIA GROWTH HUB AND PARTNERS overall needs.</b>	
<b>NEW ANGLIA GROWTH HUB requires the ability to show different controls or forms for different types of data.</b>	
<b>Clear navigation options for user access</b>	
<b>Users should be able to quickly navigate to previously used and created records.</b>	
<b>Main forms should show a complete picture of activity against the record ie an Account form should show Contacts, Enquiries, Activities including grants and History associated to the record from a single view.</b>	
<b>A Company and Person profile picture should be available against the record.</b>	
<b>Entity forms such as Accounts/Contacts etc should provide the ability to design forms to NEW ANGLIA GROWTH HUB AND PARTNERS's requirements.</b>	
<b>Hyper linkable controls should be available so users can jump out to social</b>	

<b>media sites, without leaving the CMS system if possible.</b>	
<b>Selection type controls for easy access and standardised results and be updated by Super Users.</b>	
<b>Users should be able to build relationships or associations to other companies within CMS and see a visible hierarchy unless access is limited to 'read only'</b>	
<b>SIC CODE data should be searchable and show corresponding SIC CODE Description information and the related New Anglia LEP Sectors.</b>	
<b>A Map should be visible against the Company record to aid with remote navigation.</b>	
<b>Postcode Lookup facility should be available to auto populate addresses.</b>	
<b>Controls should have the facility to have pop up help/hints against them.</b>	
<b>CMS should have the ability to record the Source of the contact ie Email marketing campaign, or referral source so that we can manage the cost effectiveness of our marketing.</b>	
<b>Super Users should be able to add additional fields to the main Find data screens.</b>	
<b>Searching for data should allow for conditional searches ie company name starts with 'C' OR address postcode contains 'DY%'</b>	
<b>Should be able to search across different entities ie Company and Person data in a single search.</b>	

<b>Data returned from searches should then allow the user to create groups from the data.</b>	
<b>Super Users should have the ability to configure the controls shown in data grids within the forms.</b>	
<b>Users with the appropriate level of access should have the ability to filter data grids real time to quickly locate data and export a csv file for further analysis.</b>	
<b>Users should be able to upload and attach documents and photographs against a record.</b>	
<b>Business Process - The CMS should have the concept of a Business or Sales Process allowing the user to be 'guided' through a records journey ie the Grant Application process, moving through Stages as the application progresses, including completion</b>	
<b>The CMS system must be able to link and be updated by third party data bases such as MINT for example.</b>	
<b>NEW ANGLIA GROWTH HUB AND PARTNERS have a requirement to be able to set targets or goals as a business, by team / area or at user level.</b>	
<b>The CRM system shall have the ability to act as a comprehensive grant management system, from initial enquiry, through application and due diligence stages, to approval, formal offer, and recording of contractual outputs and quarterly claim processes until regarded as complete. To include ability to diarise and prompt at each stage, and storage of key grant documents and client notes. (Smartsheet is currently used as our grant management system).'</b>	
<b>The growth hub or partner should be able to measure and understand if a</b>	

<b>business or at user level they are on target to achieve these goals and monitor performance.</b>	
<b>Dashboards should be User Configurable.</b>	
<b>Dashboards should be specific to the User or Team showing appropriate information.</b>	
<b>Dashboards should show real-time dynamic data and provide both visual graphs and list type data.</b>	
<b>Dashboards should be able to pull together data from a variety of sources to display in Dashboards that will be utilised by the board.</b>	
<b>Dashboards should be able to display data from third party sources e.g. from external portal websites.</b>	
<b>Reports should be easily available to users but should be restrictive to the type of data the user have access to.</b>	
<b>Reports should be configurable by Super Users once they have received Training.</b>	
<b>Summary Reports should be available showing high level information at both standard and custom entity levels.</b>	
<b>Reports should be able to run against a variety of selection criteria and show data from both standard and custom entities.</b>	
<b>Templates - Users should be able to pre build both word and email type mail merge templates and populate with CMS data.</b>	
<b>Standardised templates configured by Super User are available to appropriate users.</b>	

<b>Mass mailings should utilise templated emails.</b>	
<b>Groups - Users should be able to build Groups or lists of data based on cross entity criteria.</b>	
<b>Group building should be available across multiple levels and include both standard and custom entities.</b>	
<b>Super Users should be able to control which columns appear in groups, what the groups are sorted by and add any conditions to the groups.</b>	
<b>Once built, groups should be available to other users specific to their user name, role or team.</b>	
<b>Users should be able to carry out actions within the system based on the group ie Mass Update of data, Mail Merges, sending out communications.</b>	
<b>Outlook Integration - Email Tracking - This is a key requirement for NEW ANGLIA GROWTH HUB AND PARTNERS and a 2 way integration with Exchange is the preferred solution for NEW ANGLIA GROWTH HUB AND PARTNERS</b>	
<b>NEW ANGLIA GROWTH HUB AND PARTNERS are considering using a hosted Outlook system provided by CobWeb.</b>	
<b>Incoming emails should be easily tracked against individual records ie Projects and Enquiries, not just automatically linked to the contact record.</b>	
<b>Emails being sent out of Outlook should also be tracked against CMS records if the users requires.</b>	

<b>Tracked emails should be easily found within CMS.</b>	
<b>Calendar Synchronisation - Tasks and Appointments should be integrated with CMS and Outlook</b>	
<b>A 2 way integration should allow for the population and management of Calendars.</b>	
<b>Calendar synchronisation to mobile devices is also required.</b>	
<b>NEW ANGLIA GROWTH HUB will shortly have several Samsung Tablets 10.1 and several Samsung 7 mobiles that will need to be used in conjunction with the CMS.</b>	
<b>Mobility - NEW ANGLIA GROWTH HUB wants to increase their face to face meeting approach so mobile will become an increasing must have requirement.</b>	
<b>Mobile &amp; iPads Access to Mobile devices predominantly Android mobile devices but possibly some iPhones and iPads. Including the collection of digital signature at point of contact.</b>	
<b>NEW ANGLIA GROWTH HUB AND PARTNERS require the ability to search and easily find records i.e. Companies, People, Enquiries and custom entities etc</b>	
<b>NEW ANGLIA GROWTH HUB AND PARTNERS require the ability to update records ie Company, People, Enquiries, Communications and custom entities</b>	
<b>NEW ANGLIA GROWTH HUB AND PARTNERS require the ability to create new records ie Company, People, Enquiries, Communications and custom entities</b>	

<b>Users should be able to record emails made on a mobile device into CMS</b>	
<b>Offline Access</b> Offline access is a requirement in remote areas.	
<b>NEW ANGLIA GROWTH HUB AND PARTNERS</b> currently use Campaign Manager and Survey Monkey for E-mail marketing, social media analysis and carrying out surveys.	
<b>NEW ANGLIA GROWTH HUB</b> are currently using a free version of Sugar CMS which will require conversion to any new CMS system procured. Specifically, that means mapping of fields and automated data import	
<b>Email Marketing -</b> Generating groups of contacts to receive emails should happen within the CMS solution, subject to client permissions as recorded in the CMS	
Email Group selection should be available on various levels including selecting Contacts from businesses over a particular size, a selected industry, or a category who have not received an email in x days.	
Many groups of data should be included within a single campaign.	
Campaigns should be setup within the CMS and run from the CMS. External CMS solutions should talk to CMS and synchronise contact/email result data if the E-Marketing solution is external. Newsletters to be created with <b>bespoke templates for our partners newsletters</b>	
Contacts / Leads within CMS should record if they have been included against Email campaigns to understand email campaign saturation.	

<p><b>The campaign E-marketing email should be recorded and visible against the Contact / Lead within CMS.</b></p>	
<p><b>Click through, opens and forwards should appear in CMS against the Contact record.</b></p>	
<p><b>Email recipients who ‘un-subscribe from all’ from NEW ANGLIA GROWTH HUB AND PARTNERS’s marketing campaigns should automatically feed back into CMS and update the ‘do not email’ option.</b></p>	
<p><b>The CMS should support opt-in’s and opt-out’s across multiple campaign types and businesses.</b></p>	
<p><b>The E-Marketing solution should have a workflow engine, which allows for the trigger of actions based on user activity such as user has opened email, user has not opened email etc.</b></p>	
<p><b>Social Media - Individual’s Social Media information should be stored within CMS such as Twitter, LinkedIn, Facebook etc.</b></p>	
<p><b>A process of automatically “following” new members will increase brand awareness and encourage the user to follow NEW ANGLIA GROWTH HUB AND PARTNERS.</b></p>	
<p><b>Visibility of contacts following NEW ANGLIA GROWTH HUB AND PARTNERS within CMS is a ‘nice to have’ requirement.</b></p>	
<p><b>Events - NEW ANGLIA GROWTH HUB AND PARTNERS run events – these are managed through our website.</b></p>	
<p><b>Invitee’s to events should be determined within the CMS as a group of contacts.</b></p>	

<p><b>Contacts who have been invited to an event should be visible against their contact record.</b></p>	
<p><b>Event outcome should be recorded in CMS against the record i.e. if they attended or did not.</b></p>	
<p><b>A business who host and deliver events should be identifiable as such in the CMS.</b></p>	
<p><b>Contacts who enter, receive or sponsor awards from NEW ANGLIA GROWTH HUB AND PARTNERS's annual awards event should be visible against the company and contact record in CMS.</b></p>	
<p><b>Surveys - NEW ANGLIA GROWTH HUB AND PARTNERS require a Survey module to carry out customer satisfaction and Market Research surveys, this could be an external solution but should talk to CMS.</b></p>	
<p><b>Contacts who have been included on the survey should be visible in CMS. Responses from the surveys should be visible against the Contact in CMS.</b></p>	
<p><b>ROI</b>  <b>Clear measurable dashboards and reports should provide campaign results including:</b></p> <ul style="list-style-type: none"> <li>• <b>No of Prospects converted to Clients</b></li> <li>• <b>No of Prospects requesting face to face appointments from the website</b></li> <li>• <b>No of Enquiries from the website</b></li> </ul> <p><b>Google Analytics and website hit type data does not need to be pulled into CMS and can be analysed from the external E-Marketing solution.</b></p>	
<p><b>Customisation/Configuration</b>  <b>Wherever possible the system should be configurable by specified "super users"</b>  <b>. Where customisation may be</b></p>	

<p>necessary it is expected that the skills needed would be widely available. The CMS solution should have the ability to 'upgrade' easily without substantial cost required.</p>	
<p><b>Configuration</b> Super Users should have the ability to extend the number of fields against both standard and custom entities.</p>	
<p>The CMS should allow the user to create fields of different types ie Text, Lookups, Selection Lists, Checkboxes etc.</p>	
<p>New custom entities created by NEW ANGLIA GROWTH HUB AND PARTNERS should provide full standard entity functionality.</p>	
<p>NEW ANGLIA GROWTH HUB AND PARTNERS require the ability to show different levels of data in a single source view.</p>	
<p>NEW ANGLIA GROWTH HUB AND PARTNERS require the ability to validate entries where required.</p>	
<p><b>Customisation -</b> The CMS solution should further allow the product to be extended by apply conditional validation</p>	
<p>Custom web services called directly from the client forms ie for TPS integration.</p>	
<p><b>Workflows -</b> CMS should have a configurable and adaptable workflow engine.</p>	
<p>Workflows should be able to send alerts, emails, update records and create records based on specific record values.</p>	
<p><b>Extended CMS -</b> CMS should have a fully extendable API available to provide additional development and integration with other databases / solutions.</p>	

<b>Deduplication -</b> <b>Configurable De-duplication is required to ensure users are actively checking for existing records during data entry.</b>	
<b>Configuration includes defining which fields NEW ANGLIA GROWTH HUB AND PARTNERS require to de-dupe on.</b>	
<b>De-duplication should be carried out at data entry and when imports are carried out.</b>	
<b>Merging Data -</b> <b>Merging data should allow users to determine which controls are pulled across.</b>	
<b>Merging data should be restricted by user or user role.</b>	
<b>Data Importing -</b> <b>NEW ANGLIA GROWTH HUB AND PARTNERS require the ability to import data themselves.</b>	
<b>Data Importing should be available at different entity levels ie Lead, Company and Contact level.</b>	
<b>To allow for data cleansing, data should be easily exported, updated and then re-imported updating changed values.</b>	
<b>There should be no limitation to the number of fields available to import into. There should be high limits to the number of records to be imported in a single import job.</b>	
<b>Mass Updates -</b> <b>NEW ANGLIA GROWTH HUB AND PARTNERS require the ability to apply mass changes to many records based on different metrics.</b>	
<b>Mass update should be available by the user randomly selecting records from a list or from pre-built groups/lists of data.</b>	

<b>Mass updating records should be restricted by user or user role.</b>	
<b>Mass Deletes NEW ANGLIA GROWTH HUB AND PARTNERS require the ability to carry out mass deletion of records from both standard and custom entities, specifically when Lead data has expired. Archiving is considered an acceptable alternative to deletion</b>	
<b>Mass deletions should be carried out based on an adhoc selection of records or from a pre-built group/list of data.</b>	
<b>Mass deletions should remove associated records.</b>	
<b>Mass deleting records should be restricted to authorisation of the 2super user”</b>	
<b>Any Cloud based CMS solution should be accessed by Secure Socket Layer (SSL) protocols.</b>	
<b>Organisational Security - NEW ANGLIA GROWTH HUB AND PARTNERS require the ability to restrict access to subsets of data based on ownership.</b>	
<b>NEW ANGLIA GROWTH HUB AND PARTNERS require the ability to restrict updates made to data based on a user’s role or membership within the organisation or ownership.</b>	
<b>Data Security - require the ability to restrict access to exporting of data.</b>	
<b>Deleting of records should be restricted to a particular user or user role.</b>	
<b>Feature Security -</b>	

<b>Features such as Admin access should be restricted by user or user role.</b>		
<b>Auditing - Configurable auditing is required to capture necessary data changes.</b>		
<b>Auditing should not be an on/off option, the ability to capture specific field changes at both standard and custom entity level is required.</b>		
<b>An audit of users accessing the system is required.</b>		
<b>Client Side Integration CMS should be able to integrate with third party tools such as TPS (Telephone Preference Service) through client side coding.</b>		
<b>Integration with external website capture Lead Capture forms such as the below items should be sent to CMS via web services and trigger actions such as alerting users or creating records within CMS.</b>		
<ul style="list-style-type: none"> <li>• Expressions of interest</li> <li>• Face to face appointment requests</li> <li>• Downloading forms</li> </ul> <b>Integration with new portal linking business directory information against the company record in CMS.</b>		
<b>NEW ANGLIA GROWTH HUB AND PARTNERS currently segment their data by different categories and types of companies. Segmenting data is a key requirement for NEW ANGLIA GROWTH HUB AND PARTNERS to allow them to locate, extract and analyse their success.</b>		
<b>DRAFT PROGRAMME FOR CMS PROJECT</b>		
<b>Activity</b>	<b>Description</b>	<b>Time</b>
<b>Kick-start, Analysis and Design</b>	<ul style="list-style-type: none"> <li>• Analysis</li> <li>• Identification of customisations required to meet NEW ANGLIA</li> </ul>	

	<p>GROWTH HUB AND PARTNERS requirements</p> <ul style="list-style-type: none"> <li>• Design document</li> <li>• Identify and scope integration elements</li> </ul>	
<b>Deployment of Solution</b>	<ul style="list-style-type: none"> <li>• Setup of New CMS solution Online</li> <li>• Deployment of Growth hub and partners customised solution for CMS</li> </ul>	
<b>Build</b>	<ul style="list-style-type: none"> <li>• Modifications based of identified requirements during Analysis</li> <li>• Deployment of third party tools</li> <li>• Allowance of time for integration development</li> </ul>	
<b>Reports*</b>	<ul style="list-style-type: none"> <li>• Allowance of time to make bespoke report modifications based on data changes and NEW ANGLIA GROWTH HUB AND PARTNERS specific requirements</li> </ul>	
<b>Migration</b>	<ul style="list-style-type: none"> <li>• Provision of import templates to NEW ANGLIA GROWTH HUB AND PARTNERS</li> <li>• NEW ANGLIA GROWTH HUB AND PARTNERS to populate templates with data</li> <li>• To import data using the New CMS solution import functionality</li> </ul>	
<b>It is anticipated that parallel running of our existing systems and the new system to start here</b>	<ul style="list-style-type: none"> <li>• Sugar CRM</li> <li>• <a href="#">Evolutive (Alcium Software)</a></li> </ul>	
<b>Outlook Add in</b>	<ul style="list-style-type: none"> <li>• Deployment of New CMS solution Outlook Plugin for 16 users</li> </ul>	
<b>Exchange/Email Setup</b>	<ul style="list-style-type: none"> <li>• Deployment of CMS server side synchronisation with exchange</li> </ul>	
<b>Test</b>	<ul style="list-style-type: none"> <li>• End to End testing of solution with users</li> </ul>	
<b>Training</b>	<ul style="list-style-type: none"> <li>• 4 sessions of 4 people</li> <li>• Covering; all functionality required to complete the processes within CMS, reporting capability</li> </ul>	
<b>Admin/Super User Training</b>	<ul style="list-style-type: none"> <li>• Technical Training on New CMS solution</li> </ul>	
<b>Go-Live Support</b>	<ul style="list-style-type: none"> <li>• Full day committed to answering user questions, adhoc training initial support</li> </ul>	
<b>Project Management</b>	<ul style="list-style-type: none"> <li>• Project Support activities</li> </ul>	

<b>Licences</b>	<ul style="list-style-type: none"> <li>Provision of any licences required to operate the CMS</li> </ul>	
<b>TOTAL</b>		days

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