West of England Growth Hub Web Site

INVITATION TO TENDER

Contents

1. Executive Summary

1.1. Background

The Government, through the Department of Business, Innovation and Skills (BIS), is helping create a national network of Growth Hubs, one in each Local Enterprise Partnership (LEP) areas across the English regions as part of BIS plans to make it easier for businesses to start and grow, by ensuring business support is simpler, more joined up and easier to access.

Simpler, by providing a single local access point for all public and private sector business support; more joined up by aligning local support with national programmes; and easier to access by:

- Promoting business support locally through a website and telephone number;
- Assessing a business's needs and connecting them with the right support; and
- Making it easy to contact other businesses for advice, support and mentoring.

On behalf of the West of England LEP, Business West is designing and implementing, and in future operating, the Growth Hub covering the West of England LEP area.

The strategic intent of the West of England Growth Hub is to become financially self-sustaining from April 2016 onwards. It will not itself offer support services directly to businesses or employ advisers to conduct diagnostics of a business's needs; rather it will create a partnership with the existing, well established business support infrastructure in the area who will provide direct services.

A significant contribution to achieving the above strategic goals will be made by a highly effective website, which is therefore a critical feature of the West of England Growth Hub

1.2. Objectives

The key objectives of the West of England Growth Hub web site is to provide a single local access point for all public and private sector support. A key deliverable of the new site is to develop a process and customer journey that is simple, consistent and virtual.

The new site will introduce elements of the idealised BIS Growth Hub through:

- aligning, integrating and promoting both national and local support in one on-line domain;
- promoting brand alignment between the Growth Hub and national programmes such as the Business is GREAT campaign, MAS, Growth Accelerator and UKTI;
- joining up business support offers and developing a consistent approach by utilising both local and national assets (GOV.UK and Business Link information and tools for example) already in the market;
- integrating service provision with local face-to-face and telephone support and the national telephone helpline;
- signposting, where appropriate, to all available business support in the West of England (national, local, public, private);
- providing a comprehensive on-line resource that is easy to find and access, consistent in its provision of information and underpinned by market demand;

- developing a resource that supports greater collaboration between partners and peer to peer support between customers.

Our proposed on-line solution will provide a dynamic web resource with the ability for a customer to access effective and tailored solutions at any given time. Our proposed approach puts the customer very much in control through providing access to transactional, task focussed and strategic advice, information and tools as well as access to a standard directory of providers and events calendar.

Our proposal is to provide as much of the resources available within the site through the use of APIs, syndicated content and personalised search tools to deliver accurate, relevant and real- time information. Finally, we recognise that not all businesses know what they need so it is essential that we develop a number of journeys to the same end point through simple navigation, decision trees and site search facilities.

1.3. Audience

A detailed analysis of the target market is provided in the following document:

Appendix A - Audience segmentation matrix

2. Features

2.1. Functional Diagram

An overview of the functionality requirements and how each element of the site relates to the others can be seen in

Appendix B - Growth Hub Web Site Functionality Diagram

2.2. Membership

A core requirement of the web site is to engage more closely with high-growth businesses across the key sectors. In order to do this a key site call to action is for visitors to 'Get Involved' – i.e. to register on the web site to become a member.

Registration should be made as quick and easy as possible and in no way be a barrier to engagement with any of the services or service providers. Registration will provide rich content to enable the following:

- Targeted content/emails - see Recommendations Engine (section 2.5.1) / Marketing Engine (section 2.7)
- The Eligibility Checker (Section 2.5.3)
- Customer specific reviews / testimonials (Section 2.10)

The first time a user fills in any form on the web site it should create the user profile and every subsequent action/form should populate the profile further to give as detailed knowledge as possible about each member.

2.3. Service Catalogue

Whilst it is not envisaged there will be any financial transactions processed through the site, the model we have started to build the information taxonomies around is based on an e-commerce platform, i.e. a range of products (or in this case services) provided by a range of vendors (service providers), which belong to a range of categories.

The service products themselves might take the form of

- Services.
- Online tools from 3rd parties (see Section 2.8 below).
- Documents.
- Training courses.
- Events.

The web site should support the facility to upload supporting docs (e.g. PDFs) against services for download, as well as click through links to more detailed content on 3rd party sites.

2.4. Categorisations

Both services and service providers will need to be categorised by

- Sector (e.g. financial, construction, manufacturing, business services etc.)
- Product category (e.g. sales, HR, marketing etc.)
- Profile (e.g. start-up, established, high-growth etc.)

Any given service or service provider must be able to belong to one or more of any of these categories.

In addition a 3-tier categorisation has been developed (to further inform how we should construct decision trees) based on extensive market research on SME business needs at any given point in their growth cycle. This is key to the proposed model as provider service categorisations are often not fully aligned with the actual needs of a business.

Broadly speaking, this categorisation model identifies a small number of top level problem categories that every SME faces at some point or another. Each of these can be divided into several sub-categories and from there, the specific requirements of the individual customer may vary depending on the user's level of experience.

A simplified example of the hierarchy could be constructed as follows:

- Funding
  - Grants
    - Experienced
    - Inexperienced
  - Loans
    - Experienced
    - Inexperienced
- People
  - Recruitment
    - Experienced
    - Inexperienced
  - Redundancy
    - Experienced
    - Inexperienced

Any given service or service provider might be relevant at one or all levels of this hierarchy. The exact definition of the hierarchy is still a work in progress, but our current thinking is provided in the following documents:

- Appendix C - Problem categories
- Appendix D – Example taxonomy

2.5. Solution Finder

One of the key objectives of the site is to provide visitors with quick and easy access to a broad range of relevant services, through a variety of different avenues of questioning, with as few clicks as possible.

Our research so far has identified a number of different user profiles (and associated journeys), each of which will approach the Growth Hub site with a different set of requirements and associated inputs and outputs. These are detailed in section 3 but can be summarised as:

- I know the service I want.
- I know the service provider I want.
- I know the problem but not the solution.
- I'm looking for solutions in my sector.
- I'm looking for solutions that might be relevant to me.

2.5.1. Recommendations Engine

Visitors should be able to easily search for relevant services using the categories in section 2.4, however, the web site should also have the facility to make recommendations.

As a result, in addition to links between services and their categories as outlined above, there should be links:

- created between individual services (e.g. If you are interested in this product you may also be interested in these);
- created between categories (e.g. People interested in HR may well have need of legal advice as well);
- created by the ways in which users are navigating from one product to another, and their adoption of specific products. (e.g. people who liked this product also found these of interest).

The solution is expected to store data on how users are navigating between the services and service providers and use this to continuously refine the list of services it will recommend to any given user.

2.5.2. Decision Trees

The decision trees are an enhancement of the standard filters and categories. It is a tool designed to help users who are not clear on the specific service or type of service that they want to get to a list of relevant services. An excellent example of the type of solution required is the Let's Start Comparing tool on www.comparethemarket.com.

It is envisaged that the user will be asked a series of straightforward questions that guide them through the 3-tiered categorisation as outlined above. For example, a simple question such as "Do you want help generating sales or fulfilling them?" will effectively apply a set of filters to the 3-tiered category model, and return a list of tagged services. Each question will further refine the list of services and will simultaneously update the user profile if that particular user is behind the site login.

2.5.3. Eligibility Checker

A key output from our user interviews was the use of eligibility checkers, where it was identified that users would be willing to provide quite detailed and sensitive information about the current status of their business (e.g. turnover, no. of staff, gross profit etc.) and their growth aspirations, if this would return a list of useful services for which they qualify.

From a technical perspective this may work in a very similar way to the decision tree, but is distinguishable as a separate tool both in the types of questions that will be asked, which will be of a more direct and sensitive nature, and in the list of services it returns – which will be likely to focus less on the softer services and more on those where there is a perceived saving or financial gain.

The responses to these questions will provide key business data and enable the measurement of growth and growth potential across users of the site. In addition, two very clear caveats emerged from the user interviews:

- The information must be guaranteed to be secure and not shared in any way.
- The quality and relevance of the returned list of services must be proportionate to the effort and the value of the data submitted.

Given the sensitivity of the information and the potential value of the results the eligibility checker could be a valuable incentive for users to register for membership.

2.6. Events

At this stage, we are still reviewing how we present event data to users of the site. Whilst we may well just point users to a 3rd party event calendar we would like to evaluate the option of importing events from an external resource such as EventBrite or the Business West events calendar. For this option, the events that are imported need to be searchable via the same search terms outlined in the Solutions Finder section above. In addition, users must be able to import any given event into their Outlook / Gmail calendar and be able to click through to the events on the source web site.

2.7. Marketing Engine

The system developed will be required to undertake three specific e-mail tasks:

1. Automated with standard content
    a. Welcome / Lost Password / New products this month
2. Automated with customised content
    a. Monthly / 6 monthly / annual automated email with tailored content (defined by recommendation engine)
3. Manual email with custom content
    a. Targeted emails sent from the CRM, but with content selected from the recommendations engine.
    b. The system administrator should be able to search for all contacts for whom a specific service, training course or event might be relevant, or for whom content relating to one or more sector, problem category or profile (as defined in Section 2.4) might be relevant and create customised emails for delivery in HTML / Rich text / Plain text.

The platform for delivering this functionality should be recommended by the selected development company and could be achieved either through custom development or integration with 3rd party mailing engines / CRM tools. Costs and details of the support mechanisms for any such 3rd party tools should be clearly identified along with the reasons for its selection.

2.8 APIs, syndicated content and 3rd party tools

The https://gov.uk web site has a large amount of content and some useful business tools available for re-use. In some cases these tools have been designed to be readily available for integration into other web sites, in particular growth hubs, e.g:

https://www.gov.uk/starting-up-a-business

https://www.gov.uk/starting-up-a-business.json

Some of the relevant tools that have been identified so far include

- Business Finance Support Finder
  - https://www.gov.uk/business-finance-support-finder
  - https://www.gov.uk/api/business-finance-support-finder.json
- License Finder
  - https://www.gov.uk/licence-finder
  - https://www.gov.uk/api/licence-finder.json
- Contracts Finder
  - https://www.gov.uk/contracts-finder
  - https://www.gov.uk/api/contracts-finder.json

There is also a diagnostic form available in beta that has similar thought processes to the Decision Tree outlined in section 2.5.2 and being proposed here

- https://www.find-business-support.service.gov.uk/bdt/diagnosticForm

Some other 3rd party tools are currently being researched which may need to be created as services within the web site, and searchable in the same way as other services, but will link out to the relevant partner sites rather than being embedded through APIs.

2.9 Widgets for 3rd Parties

There is a requirement is to be able to publish relevant lists of Growth Hub services on 3rd party web sites as this is seen as a crucial tool for marketing and SEO. For example to show all finance services on the Association of Certified Chartered Accountants web site. It is expected that the developer will provide functionality to render fully responsive, filtered lists of services on selected and agreed 3rd party web sites.

Ideally the rendered code will allow users on the remote site to filter the lists using the Find Solutions features defined above.

2.10 Case Studies, Testimonials, Reviews and Star Ratings

In order to increase confidence in and drive engagement with specific services we propose to show reviews from customers who have engaged with them. In user interviews it was made clear that word of mouth is by far the most trusted resource when comparing products and services and that that case studies developed and presented by the service provider were seen as little more than marketing copy. As a result, there is a requirement for Growth Hub to maintain an impartial, arms-length approach to feedback, presenting both positive and negative comments in a way that retains the authenticity of the source and genuinely enhances the user's ability to make a decision on which service is right for them.

Reviews need to be relevant – i.e. customers with a similar profile (sector, size, business need) and should form part of the search / results criteria available in the Solution Finder. Potentially un-anonymised reviews could be made available only for members

2.11 Management Reporting

Crucial to the success of the Growth Hub is the ability to report on its effectiveness in delivering growth services and positively impacting on regional growth. It is therefore critical that we are able to track how people are using the site and to report on it. This reporting should include tracking the journeys that users take through the site, which links they make between searches and products and the services that users actually click through to (because there are no actual transactions to record, we should regard the opening of a service or service provider landing page as a 'sale').

It may also be the case that in order to qualify for certain services a user must first meet certain criteria. These can be presented to the user in the form of a questionnaire on the service landing page where the responses to the questionnaire will contribute to the User Profile. The tracking of such activity is already a pre-requisite for the Recommendation and the Marketing Engines, however, we will need to be able to interrogate the data to produce reports (for external distribution) on how the site is being used.

3 User Profiles

Following the user interviews conducted in the discovery phase we have identified the following user personas and journeys, which help to identify the primary users of the site and how we believe they are likely to use it.

The three primary user personas we have identified are:

1. **The Business Owner**

   Looking for ways to solve a specific problem within their own business, or browsing for future opportunities

2. **The Researcher**

   Asked by the Business Owner to find a list of potential opportunities / solutions

3. **The Business Advisor / Consultant**

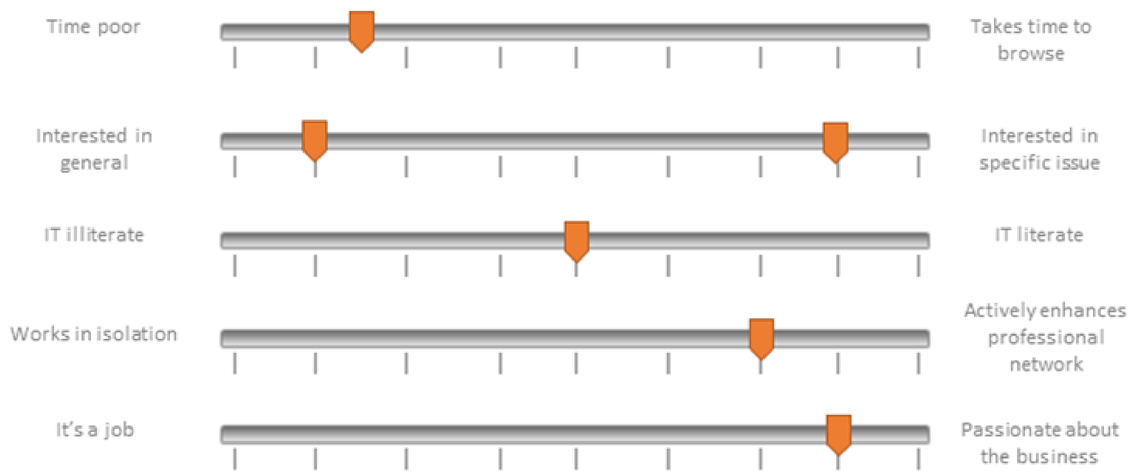
   Who may be advising a number of different businesses and looking for a solution to a particular problem – but is in fact adding to their own value that they can take to all their customers.

Business Owner

The Business owner wants to expand their business. They have identified a problem that they need to solve, and they have realised that they need outside help.

They may also be looking for solutions to potential problems; to prepare themselves for upcoming eventualities.

Attitudes



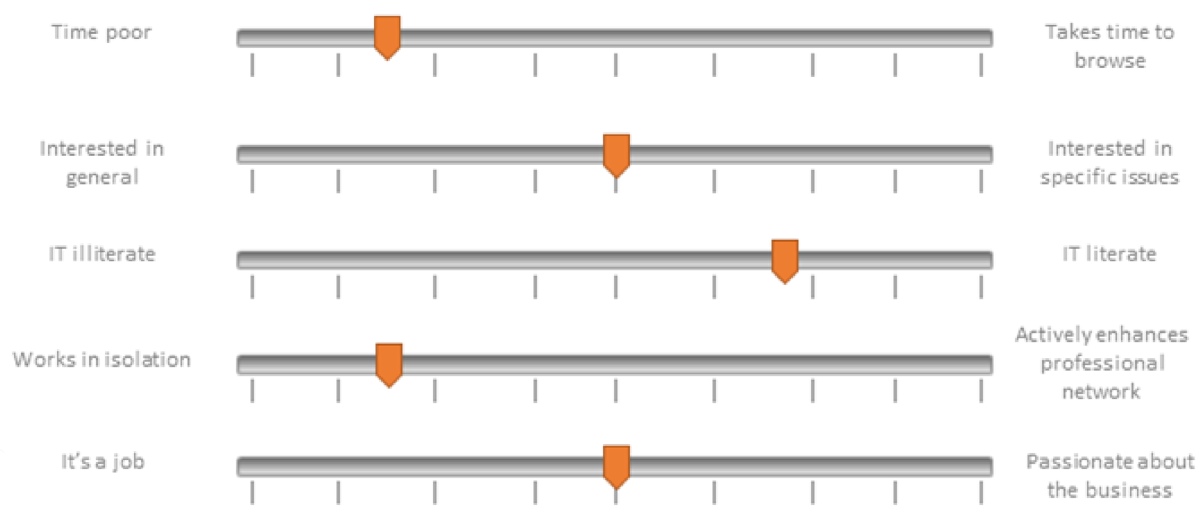
"I want a single point of reference that allows me to quickly and reliably search and evaluate services that will help me solve my issue"

Researcher

The researcher has been tasked by the business to help find the solution to a pre-defined issue.

They need a comprehensive list of workable products and services that they can compile into a list of possible options to be presented to the business owners.

Attitudes



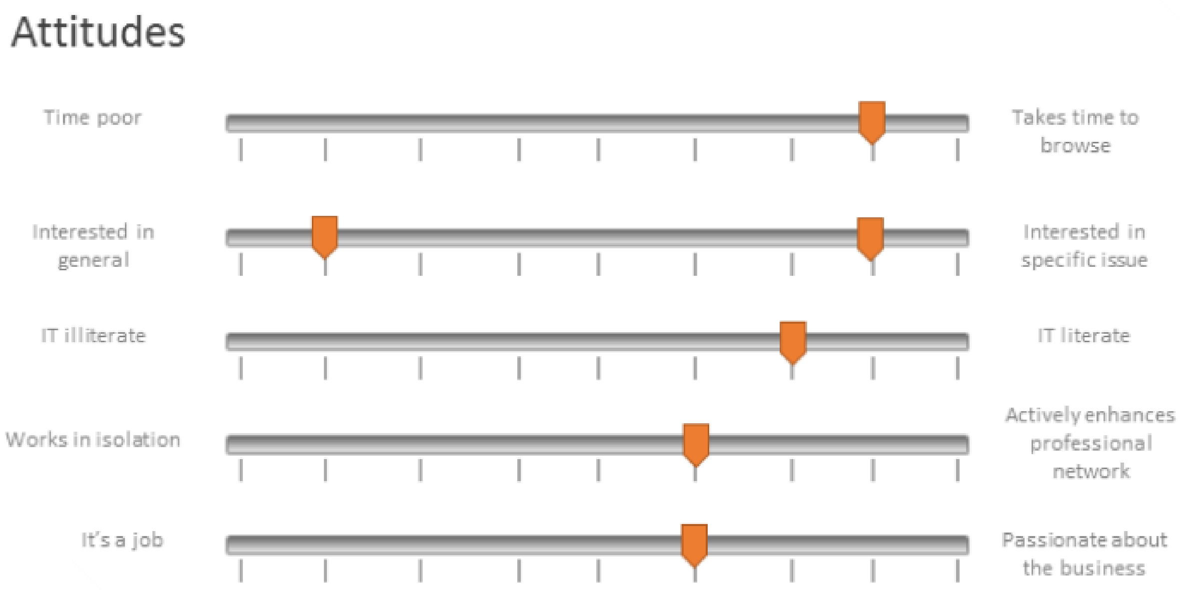
"I want to assemble a list of relevant products and services that address the issue at hand"

BUSINESS ADVISOR / CONSULTANT

The Business Consultant has been hired based on their experience in identifying solutions to business problems.

They are expected to shortlist and make recommendations and need evidence to support their suggested course of action.

They need to keep in touch with what services are available and how they might help their clients.



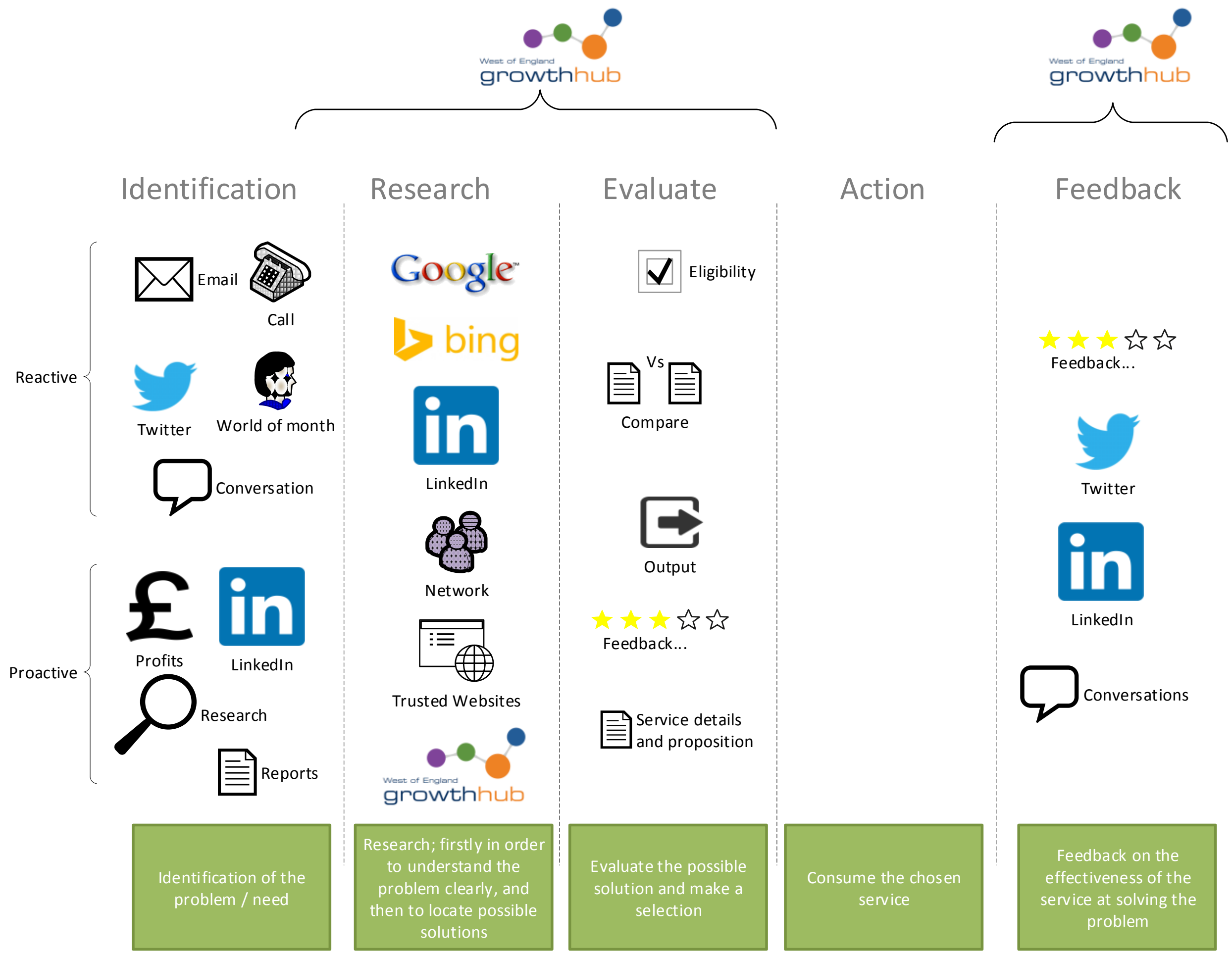
"I want a comprehensive source of services that is well structured and lets me explore options and alternatives"

3.1 User Experience

The User Experience is a high-level view of how the visitor will interact with the site and the phases of that interaction:

1. **Identification:** the list of triggers that will drive users to recognise the need for Growth Hub services.
2. **Research** and **Evaluation:** the stages where the users are looking into the solutions that will fulfil their needs and comparing alternatives. These are among the primary functions of the web site.
3. **Action:** the user engages with a specific service
4. **Feedback:** a critical part of the process and of the web site as it relates to how we will sustain the engagement with the user and how the user experience will evolve following repeat usage.

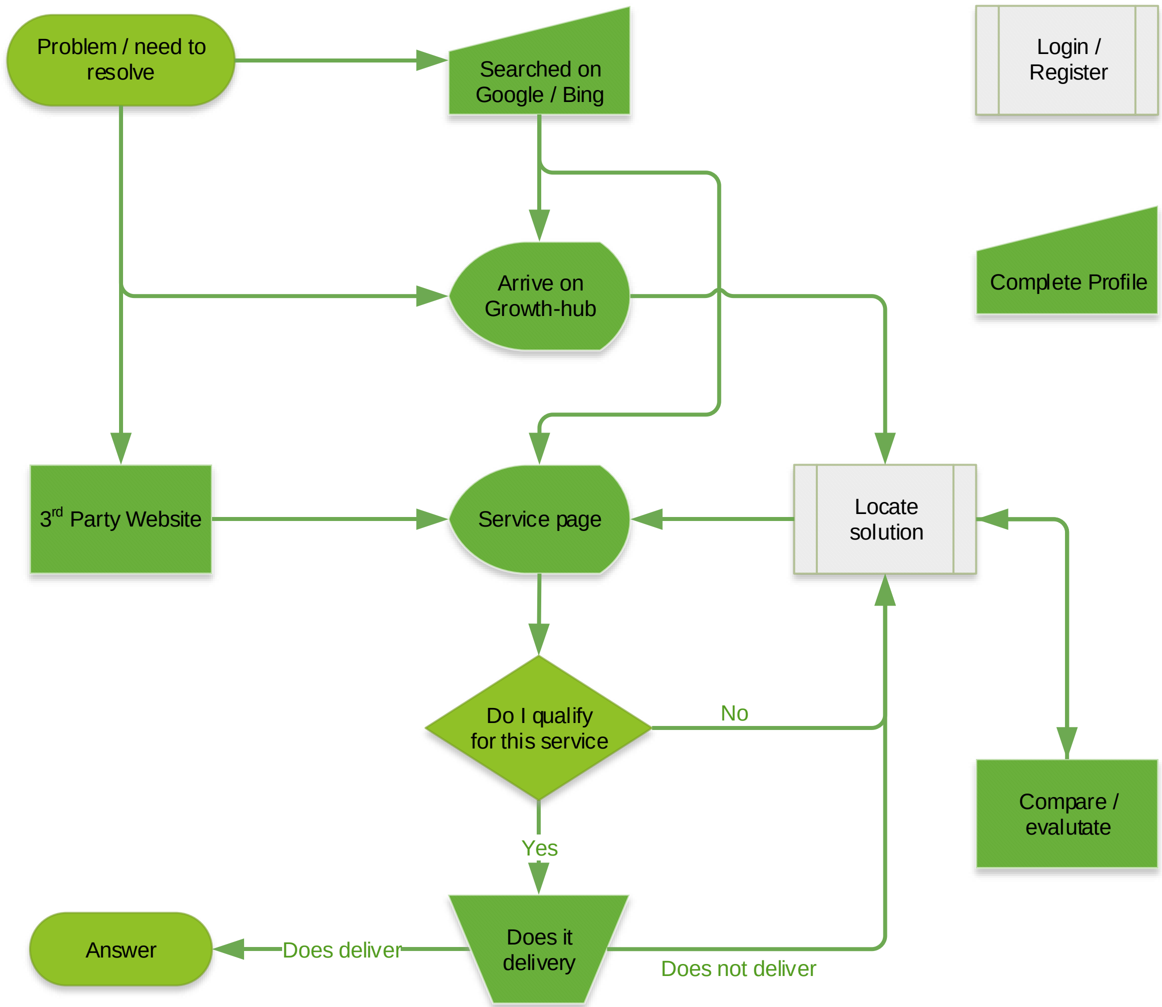
This is an evolving picture that will develop as the project progresses.



3.2 User Journeys

The user journeys outline how a visitor will interact with the web site, plotting the natural course the user would wish to take. These processes will gain more definition during the early part of the development process.

Site Navigation

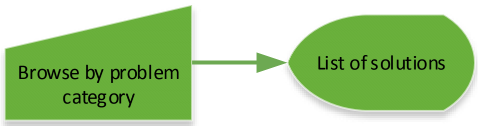


‘Locate Solution’ – Scenarios

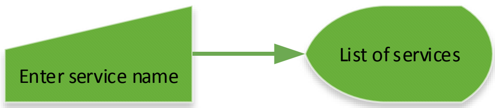
The journeys below expand on the ‘Locate Solution’ process in the diagram above – outlining the differing requirements a user may have and how this might affect their journey through the site.

A - I know the service provider I want

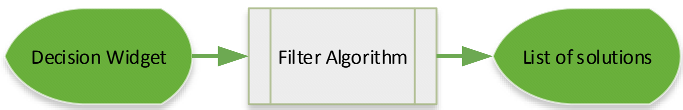
B - I have a defined situation but I’m not aware of the solutions



C - I know the service I want



D – I am looking for solution that might be beneficial to me



E - I know my sector and what to know what solution are relevant to me

4 SEO and Content

4.1 SEO

It is anticipated that the development company will work closely with the Business West marketing team to define an information architecture that provides landing pages that are coherent with the search terms in use in the public domain.

4.2 Web site content

The development company is not responsible for the production of the web content, however they will be required to work with the Business West marketing team to define the information architecture that will ensure that the content is presented in the most effective manner.

5 Design

The Corporate Identity is an evolving project already in hand.

http://wearegrowth.co.uk

The development company will be provided with brand guidelines which they will use to create a set of templates for the web site.

Templates will include, but may not be limited to

- Homepage
- Events Calendar
- Service Search Results
- Case Studies
- Decision Tree
- Service Provider
- Service Page
- General Text

6 Technical Requirements

6.1 Platform

The choice of platform is in the hands of the development company, however, the expectation is that the chosen platform is able to meet the requirements laid out in this document.

Responses should demonstrate a clear understanding of all of the feature requirements and outline how these will be met by the recommended platform, highlighting any specific examples of why this system should be selected over other comparable systems.

Any one-off or on-going costs associated with the licensing and maintenance of the platform should be clearly identified.

6.2 Compatibility

- IE 9+ current versions of Chrome, Safari and Firefox

  Graceful degradation expected for lower browser versions

- Accessibility AA Compliant
- W3C XHTML Valid
- Content parity across tablet, mobile and desktop – with the user interface optimised for viewing and interaction across the range of device resolutions prevalent today.

6.3 Hosting

Developers are asked to recommend a hosting solution and provide approximate costs for the first year. This should include details describing:

- Security Architecture
- Data Protection (e.g. EU Model Clauses)

  http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2010:039:0005:0018:EN:PDF

- Backup and DR
- Scalability
- On-going support and maintenance

7 Project Delivery Process

The development company will be working closely throughout the project with both Business West and their consultancy partners who have been involved with the market research conducted so far, and will continue to be involved in the definition of the marketing strategy and the Service categorisations.

The development company should provide detailed information regarding their project delivery process, covering all aspects of

- Project Management Methodology (including a sample Project Plan)
- Discovery
- UX Process

- Design
- Development
- UAT / Beta Testing
- Launch

Details of any accreditation should be supplied along with reference sites where relevant.

8 Budgets

The development company is required to provide itemised cost estimates for each of the features outlined in section 2 above.

The upper limit to the budget for this project is between £75,000 and £90,000. Estimates must include all elements of the project delivery including

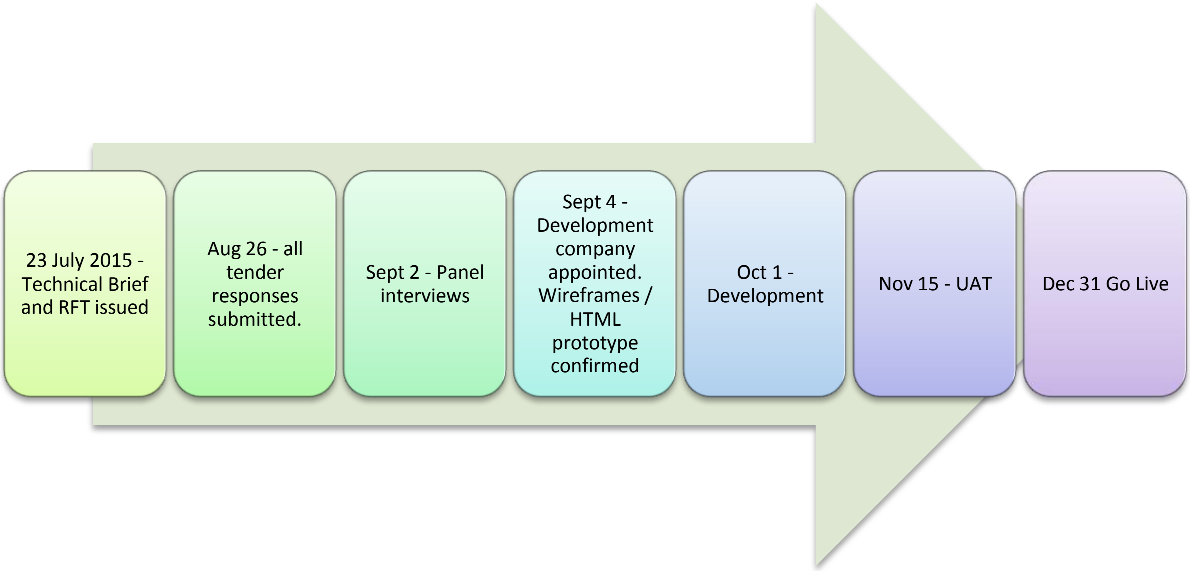
- Design
- Development
- Project Management
- CRM / mailing engine implementation
- UAT
- Go Live

8.1 On-going costs

On-going costs must be provided for

- Hosting
- Support and maintenance
- 3rd party tools (e.g. CRM / Mailing Engines / platform licensing)

9 Project Timeline



10 Selection Criteria

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Criteria	Weighting
Understanding of the tender requirements and background	5%
Competence, relevant knowledge and experience	5%
The quality, innovation and delivery methodology of technical specification.	50%
Value for money	40%

11 Instruction to tenders

11.1 Any queries regarding this specification should be submitted no later than **21st August 2015,** and addressed to

Clive Wray, Director of Public Sector Contracts, Business West
clive.wray@businesswest.co.uk

11.2 All tenders must be submitted in writing, and including all supporting documentation no later than 12.00 pm on **26th August 2015** to Tara Gillam, Head of Enterprise, GWE Business West, Leigh Court Business Centre, Abbots Leigh, Bristol BS8 3RA. (tara.gillam@businesswest.co.uk)

11.3 All tender costs will be borne by the contractor.

11.4 A project manager should be nominated who will control all aspects of the project and be the prime and sole point of contact.

11.5 As part of the tender submission, a sample project plan should be attached to demonstrate time scales and lead times for a typical installation of this size.

11.6 The contractor should provide details of their organisation in the form of an organisational chart, including Sales, Installation and Maintenance Departments. In addition the location of the Head Office and Local Office responsible for this contract should be provided. Details of the maintenance resources in terms of support and hosting should also be included.

11.7 The contractor should provide details of 2 references for projects of similar size or larger than that outlined in this specification. These references should include a contact name and telephone number.

11.8 The contractor should provide details of the number of current sites of similar nature in the UK, which they currently maintain.

11.9 The intended activation date for the system is **31st December 2015**. Contractors should indicate milestone dates required to meet this timescale