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| CUSTOMER: UK Trade and Investment |  |  |
| PHASE: Discovery |  |  |
| START DATE: 01/6/15 |  |  |
| TIMEFRAME: 8 weeks |  |  |

# RESPONSES DUE:

20/05/15

# CURRENT SITUATION / BACKGROUND INFORMATION:

# The Overseas Business Networks Initiative (OBNi) is the delivery of government export services through partnerships with private sector organisations, predominantly British Chambers of Commerce in the foreign markets. At present, they use individual, disconnected CRM systems of varied sophistication. Reporting is done through an Excel spreadsheet which is then sent to UKTI to enter into our internal system (which the delivery partners do not have access to). We wish to look at the need for an integrated CRM and reporting system.

# CURRENT TECHNOLOGIES AND LANGUAGES

# A range of legacy systems from Excel spreadsheets to online solutions such as Insightly. The solution may need to input directly into UKTI’s CDMS system.

# CURRENT ROLES AND RESPONSIBILITIES OF THE CUSTOMER

# Some user needs research has already been carried out but the specialist would take on full responsibility for the research and the report to the GDS board (including any amendments necessary until approval by the board).

The UKTI team fulfil all roles besides User Research, including:

Service Owner

Business Analyst

Product Manager

Delivery Manager

# REQUIRED OUTCOMES

# The UKTI project team is looking for a researcher to support the creation of a new CRM and reporting system for a network of delivery partners delivering export services for British SMEs. It is expected that the chosen supplier will carry out a comprehensive review of the existing situation and translate this into a series of user requirements and specific user needs. They will produce a full discovery stage user research report and see this through the GDS board approval to move into Alpha (including any amendments as a result of the report being rejected by the board).

Although user needs are not yet formally known, we assume there to be a need for a joined-up service. At present, our delivery partners use a series of disconnected services of varying sophistication. There will need to be significant attention to data security since customer data will be handled. The service will need to balance both CRM functionality and reporting of services delivery back to UKTI. There is a degree of urgency around this work since the ability to expand the project, as is the appetite for 2015-16 and 16-17, requires quality technical infrastructure to support it.

The chosen supplier will have extensive experience in carrying out Discovery user research, translating these into requirements and producing a report from this.

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# CAPABILITIES AND ROLES

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| **CAPABILITY** | **ROLE** | **CUSTOMER’S REQUIRED OUTCOME** |
| User Research | User researcher | Full Discovery report seen through GDS approval to Alpha phase. |

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| PRICING MODEL Time and Material |  |
| CUSTOMER LOCATIONS London, 1 Victoria Street |  |
| TEST & DEVELOPMENT REQUIREMENTS |  |

No test or development requirements expected – aim of the task is conducting Discovery user research and producing a report for GDS approval.

**HOW TO RESPOND**

Please submit the following:

CV’s, Pricing and Availability. Please ensure that your Pricing is included on a Cover sheet and not within the CV.