R:\01 ADMIN\Gentoo Logos\New Purple Homes Logo.png

**Request for ‘RFQ’ Quotation for a CRM system to support the sales function of the new build housing team.**

**Contents**

[1. Organisation information 2](#_Toc466824778)

[2. Requirement 3](#_Toc466824779)

3. Submission requirement 5

4. Terms and conditions 6

5. Timetable 7

6. Enquiries 7

7. Checklist 7

1. Organisation information

Gentoo Homes is a residential developer based in the North East that currently delivers 200 new homes a year, with expansion planned to achieve 240 homes per annum in 2020-21.

Since Gentoo Homes was established in 2001 it has built in excess of 3000 new homes on sites ranging from regeneration to large executive developments.

Currently Gentoo Homes has nine live development sites located from Teesside to Northumberland, with its head office based in Doxford Park, Sunderland.

Gentoo Homes prides itself as a responsible builder that understands that property development isn’t just about constructing high quality modern homes, but, creating communities for its customers and future generations.

The company is part of the Gentoo Group, which is a Housing Association with charitable status, with the profits generated from Gentoo Homes re-invested back into Gentoo Group social purpose activities.

For further information about Gentoo Homes and Gentoo Group please visit

[**www.gentoohomes.com**](http://www.gentoohomes.com)

[**www.gentoogroup.com**](http://www.gentoogroup.com/)

**VISION, MISSION AND VALUES**

Gentoo’s Vision and Values are detailed below and set out its direction and culture. They ensure that the business is aligned around the desire to create sustainable homes and communities and to improve the lives of our customers. The Vision and Values ensure that all of our people understand Gentoo’s ethos and are clear about what is expected of them and the contribution they can make. The Sub Contractors Gentoo Homes appoint to deliver the works are expected to be aligned to the Gentoo Group vision and values.

**VISION:**

Great Homes - Strong Communities - Inspired People

**VALUES:**

Gentoo believe that by putting people first we can build great homes and create strong communities.

Are focused on delivering an outstanding service to our customers and as a responsible business we pride ourselves on inspiring people to make a difference,

Collaborate with key partners and other Housing Associations to influence things that affect our colleagues, customers and society,

Are one of the largest employers in Sunderland and landlord in the North East.

Gentoo have the following values:

Do the right thing

Make a difference

Work together

Keep learning

Give all you’ve got

1. Requirement

Gentoo Homes have a requirement for a Customer Relationship Management (CRM) system and are looking for innovative proposals from organisations with a demonstrable track record and/or who can demonstrate an understanding of the business needs. Together with the knowledge and experience to deliver the requirements set out within the RFQ documentation.

It is essential that the solution is both cost effective and delivers value for money.

Currently the sales operations are in the main paper based and administratively heavy, relying on colleagues to collect information from prospective customers on a variety of forms and manage this data locally in each scheme sales office. A manual consolidation activity is transacted weekly to provide information to the management team.

Whilst the strategy for managing the customer experience from lead to aftercare is mature and well documented, it again presents a large administration overhead to maintain, with little scope for analysing data and obtaining customer insight.

Gentoo Homes would like to be able to control the sales process to deliver a customer centric customer journey through delivering accurate and timely customer engagement to maintain Gentoo Homes HBF ‘five star’ house builder rating.

Other than a website which acts as a storefront to current development schemes, the business is without a customer facing digital offer. Gentoo Homes are keen to explore all options or solutions that maybe currently available in the market and would also be interested in responses that show how such a CRM system could be developed to maximise the opportunities in areas such as; marketing, event management, monitoring and social media.

It is anticipated that the CRM system will follow the below prescribed workflow in line with the key stages of the sales process / customer journey

* Stage 1: Customer registration
* Stage 2 Financial qualification
* Stage 3 Property matching
* Stage 4 Deal agreed/reservation information
* Stage 5 ‘Meet the builder’ appointment
* Stage 5 Customer choices/optional extras
* Stage 6 Exchange of contracts
* Stage 7 Home demonstration appointment
* Stage 8 Home handover
* Stage 9 Customer follow up post completion

In addition to this it is expected for the system to provide the following:

* Dash board to illustrate key financial/sales information and progress of customer against key sale process stages
* Ability to market to registered customers via email and SMS
* Provide a reporting system to extract sales data
* Undertake automated customer surveys via the system
* Potential to utilise platform for customer interaction

By investing in the CRM system to drive business efficiencies and increase sales revenue through:

* Improving sales lead management by preventing lead loss and increasing speed of conversion
* Digitalise the sales function and reduce administration
* Improve the customer experience
* Generate set reports on activity
* Ability to be used across all Gentoo Homes office locations, including small off site locations on residential development sites

**3. Submission requirements**

Submitting organisations are required to populate the two documents enclosed which are labelled Appendix A and Appendix B.

Please submit all pricing using the pricing matrix set out in the Commercial Cost Submission Spreadsheet where highlighted (Appendix B). Please note you are required to provide indicative costs in the document.

Pricing submitted in any other format may be disregarded for evaluation purposes and therefore eliminate your bid from the process.

The three highest scoring submissions may be invited to attend a meeting to discuss their submission along with providing a demonstration of their system.

The term of the Contract agreement will be negotiable depending on the product.

It is envisaged that the award will be made to one supplier who will work with Gentoo staff to manage the design, implementation, installation and coordinate all other activities relating to system.

4. Terms and conditions of the process

Suppliers are invited to participate in this quotation process and agree that a submission is made in acceptance of all of the following conditions, and in accordance with any instructions given. Suppliers not complying with any instructions within this section may be rejected for non-compliance at the discretion of Gentoo Homes.

Gentoo Homes will require the successful bidder to notify of any cost increases

during the call off period, no cost increases will be accepted other than those

increases notified to Gentoo Homes.

Costs and prices submitted must be made in UK Sterling only and be exclusive of VAT. Pricing quoted shall be deemed to include all taxes (except VAT) duties, insurance premiums, guarantees or other costs and commissions associated with the provision and delivery of the products and services (where applicable).

Gentoo Homes shall be entitled to the benefit of any conditions or warranties including rights under the Sale of Goods Act 1979, as amended which may have been given by the manufacturer or supplier thereof EXCEPT where such conditions, warranties or rights are expressly excluded by law or by the manufacturer or supplier.

Submissions are to be completed and submitted to [andrea.walshaw@gentoogroup.com](mailto:andrea.walshaw@gentoogroup.com)

The above email address is to be used for all communication.

No approach of any kind in connection with this process should be made to any other person within, or associated with, Gentoo Homes and its agents.

If any question or request for clarification is considered to be of material significance, both the question and the response will be available for review by all Suppliers via an e-mail response.

Failure to complete the process in full or to provide any documentation requested may result in your submission being rejected at the discretion of Gentoo Homes.

At the time of the quotation it is the responsibility of all Suppliers to have satisfied themselves as to the scope and content of the work required. Gentoo Homes will take no responsibility for errors, omissions and/or inaccurate statements within the information provided.

Gentoo Homes reserves the right to clarify answers made by Suppliers in their submissions. Any such requests will be made via [andrea.walshaw@gentoogroup.com](mailto:andrea.walshaw@gentoogroup.com)

Links to websites, general marketing information or excerpts from standard policy/corporate documentation are not suitable responses to questions. Any information of this nature submitted, unless specifically requested, will not be evaluated.

Gentoo Homes reserves the right at any time to:-

Reject any submission that is not complete. Gentoo Homes may also reject submissions that fail to comply with any element of this quotation process or any amended/supplemental document issued in conjunction with this exercise;

adjust the procurement process laid out in this documentation, including:

changes to the timetable;

evaluation requirements;

the content of any Call-Off Contract documentation.

choose to cancel this process at any time, thereby not enter into any contract.

The issue of this exercise in no way commits Gentoo Homes to award any contract or agreement.

No publicity is to be issued by Suppliers regarding this process.

Gentoo Homes will at its sole discretion determine if it awards all, some, or none of its requirements under this exercise.

It is unacceptable for Suppliers to engage in any activity that might lead to a breach of the Bribery Act 2010. Therefore all Suppliers shall:-

Comply fully with the requirements of the Bribery Act 2010;

Not engage in any activity, practice or conduct which would be an offence under any section of the Bribery Act 2010;

Have and maintain during the full term of the proposed Agreement policies and measures to ensure compliance with the Bribery Act 2010.

Providers shall at all times:

* Comply with the Data Protection Act 2018 (the **DPA**);
* Process any personal data supplied only in accordance with Gentoo’s written instructions (unless required by law to act without such instructions);

Ensure that people processing the data are subject to a duty of confidence;

* Take appropriate measures to ensure the security of processing;
* Only engage a sub-processor with the prior written consent of the data controller and a written contract;
* Assist the data controller in providing subject access and allowing data subjects to exercise their rights under the DPA;
* Assist the controller in meeting its DPA obligations in relation to the security of processing, the notification of personal data breaches and data protection impact assessments;
* Delete or return all personal data to the controller as requested at the end of the contract;
* Submit to audit and inspections, provide the controller with whatever information it needs to ensure that they are both meeting their Article 28 obligations, and tell the controller immediately if it is asked to do something infringing the DPA or other data protection law of the EU or a member state;
* Indemnify Gentoo and keep Gentoo indemnified against loss, destruction or procuring of data contrary to the DPA by the provider, its servants or agents.

Nothing within the contract relieves the processor of its own direct responsibilities under the DPA.

1. Dates

All responses must be submitted no later than Thursday 12 December 2019.

All responses should be submitted to [andrea.walshaw@gentoogroup.com](mailto:andrea.walshaw@gentoogroup.com)

The dates detailed are subject to change at the discretion of Gentoo Homes. Clarification meetings may be required prior to the contract award.

|  |  |
| --- | --- |
| Estimated timetable | |
| **Activity** | **Date(s)** |
| **Document Issued** | 14 Nov 2019 |
| **Closing date for clarifications** | 28 Nov 2019 |
| **Submission of quotation** | 12 Dec 2019 |
| **Evaluation of quotation** | WC 16 Dec 19 |
| **Interviews to take place** | February 2020 |
| **Notification of award** | Feb – March 2020 |

1. Enquiries

Please be advised that no queries or qualification questions will be dealt with other than those sent to [andrea.walshaw@gentoogroup.com](mailto:andrea.walshaw@gentoogroup.com)

1. Checklist

Please ensure your submission contains:

* Appendix A – Questionnaire Document - signed
* Appendix B – Commercial Cost Submission