



Soft Market Test

For

North Northamptonshire

West Northamptonshire

Website, CRM/eForm and Workforce Management systems

# Section 1: Introduction

## General Requirements

* 1. The purpose of this document is to briefly explain to suppliers the business and technical requirements and the expected scope of the Website/Intranet, CRM/eForm and Workforce Management solution(s) in order that suppliers can explain the relevance of products, services and their experience to the requirements.
	2. **Please note:** this market testing exercise is **not** an invitation to tender or a request for formal expressions of interest. This document does not form any part of an invitation to tender. Future Northants is issuing this request for **information only**. Any supplier invited to present to FUTURE NORTHANTS is doing so to support market research only and to help make any potential procurement process more focused and efficient. No supplier selection or supplier preference is implied.

## Confidentiality and Freedom of Information (FOI)

* 1. We intend to publish a summary of our market engagement on the Future Northants website. We would like to be as open as possible and share as much as we can, however we do anticipate that you may wish to keep some information confidential and we will not share any information that you do not want us to. **For this reason, we strongly advise that any information you consider to be confidential is labelled as such.**

## Background

## 3.1 FUTURE NORTHANTS is the Programme team set up to deliver the Local Government Reform to create two new unitary authorities in Northamptonshire. The Government is expected to approve the creation of two new unitary councils in Northamptonshire to provide all local government services in the county. These are expected to come into being on 1 April 2021 and Northamptonshire’s current eight councils will cease to exist.

##  The new North Northamptonshire unitary authority will cover the areas of Corby Borough Council, East Northamptonshire Council, Kettering Borough Council and Borough of Wellingborough Council. A new unitary council for West Northamptonshire will cover the areas of Daventry District Council, Northampton Borough Council and South Northamptonshire Council. Services currently provided by Northamptonshire County Council and the districts and boroughs will be delivered by the two new councils.

##  The creation of North Northamptonshire Council and West Northamptonshire Council is an opportunity to develop and transform services so they deliver what residents and businesses need, are modern and provide good value for money.

* 1. FUTURE NORTHANTS is governed by two joint committees, North Northants and West Northants Joint Committees. Within FUTURE NORTHANTS there are 13 Programmes under the 7 Senior Responsible Officers (SRO) headed by the Chief Executive of Northamptonshire County Council.

## Soft Market Test Timetable

* 1. Please read this document and if you feel that your organisation is able to contribute to this exercise please complete the questionnaire at the end of this document and return, via messaging facility on the FUTURE NORTHANTS Procurement Portal (ProContract) by 12:00; **20th December 2019. Please complete Section 3 in full and one or more parts of section 4.**

Following receipt of the questionnaires, if time and numbers allow, Future Northants may decide to hold further short sessions with providers. The decision whether or not to meet individually with providers will be at Future Northants absolute discretion. Any meetings will follow the same format for each provider and the same questions will be asked of providers. Suppliers will be asked to give a 10 minute presentation on their solution. Future Northants will be seeking responses to specific questions and the meetings, if held, will be used to enable providers to present relevant ideas for the future solution. The sessions will be held in Northamptonshire (exact location TBC)

* 1. Please register an interest and message through the Pro-contract system to confirm attendance at a potential event along with your name, contact and organisation details by **17:00; 03 January 2020.** Due to room capacity, attendance at the engagement event will be limited to a maximum of two (2) representatives per provider. At least one representative should have the knowledge to answer any functional, process and technical questions about the solution.
	2. Following receipt of supplier responses and any additional sessions and/or follow up questions a decision will then be made internally on next steps and the best procurement approach.
	3. The expected timetable is provided below:

|  |  |
| --- | --- |
| **Stage** | **Date** |
| Deadline for receipt of responses to Soft Market Test. | 12:00; 20th Dec 2019 |
| Deadline to register interest in attending potential presentation session | 17:00; 3rd January 2020 |
| Suppliers presentation session week | 13th -17th January 2020 |
| Decision on next steps  | End January 2020  |
| Tentative tender publishing | Feb/March 2020 |

* 1. **Potential responders will not be prejudiced in any future procurement processes by either responding or not responding to this soft market test exercise or by attending or not attending subsequent workshop sessions.**

# Section 2: Identification of Requirement

## Current Situation

* 1. We are running this soft market test to help us gain an understanding of the market and current technological capabilities to help us inform the strategy for the Website/Intranet, CRM and eForm and Workforce Management solutions for North Northants and West Northants.
	2. Each sovereign council currently has their own:
		1. Website/Intranet solution(s). We are looking to create two websites/intranets, one per each Unitary by 31st March 2021. Therefore we are looking to appraise the market for a technologically relevant, practical and cost effective solution(s) suitable for disaggregating County Council Services and aggregating District and Borough Services to provide one customer facing website and one intranet per unitary whilst retaining and / or improving current functionality and services.
		2. CRM & eForm solution. We are looking to create two CRM & eForm solutions, one per each Unitary by 31st March 2021. Therefore, we are looking to appraise the market for a technologically relevant, practical and cost-effective solution suitable for disaggregating County Council Services and aggregating District and Borough Services to provide one customer facing CRM & eForm solution per unitary whilst retaining and / or improving current functionality and services.
		3. Workforce Management approach/solution. We are looking to create two Workforce Management solutions, one per unitary by 31st March 2021. Therefore, we are looking to appraise the market for a technologically relevant, practical and cost-effective solution suitable to provide one customer facing Workforce Management solution per unitary
	3. We are looking to build a strong, long term stable relationship with the right solution provider(s) to work with us to develop and build our offering to our partners/customers ready for vesting day and beyond.
	4. The solution(s) that we seek, will be hosted as a cloud solution(s) and should allow us to continue to operate as we can do now with no service impact on our customers.
	5. Current Systems:
		1. Website - the existing councils are currently using Microsoft SharePoint (County Council, to be disaggregated) with Easysite, Drupal and five instance of Jadu Continuum (District & Borough, to be aggregated). There are also several microsites hosting on the Wordpress platform.
		2. CRM – 2 x Jadu CXM, 2 x Lagan, 2 x in house
		3. Workforce Management Solution – one existing council uses IEX by Nice, and one uses Avaya Workforce Management in conjunction with related Avaya products. No others currently employ a system of this nature.

## Our Requirements

* 1. Key objectives:
		+ FUTURE NORTHANTS are seeking for a solution focused on quality reliability, security and platform responsiveness allowing us to offer a Website/Intranet, CRM/E-forms service to our customers and supporting Workforce Management Solution(s) in a transparent and straightforward way;
		+ The solution(s) must provide value for money services in an increasingly financially austere public sector environment;
		+ The relationship with our supplier(s) must support us in providing the above.
	2. We are looking for a solution that will enable us to :
* Operate and offer all county and district and borough services to our internal and external customers, including our residents, easily and practically (e.g. accommodate for potential increase or decrease of volumes and new services),
* Provide our services in a cost-effective manner (i.e. software and support service costs)
* Provide a solution that is maintained and upgraded in line with regulatory and ICT requirements including security and accessibility

Website - The system should also:

* Automatically integrate with eForm, CRM solutions, payment and other Third Party products
* Allow our customers to access it securely 24/7
* Be a responsive design across all devices
* Provide a fully documented comprehensive and platform independent set of APIs which effectively allow content to be re-used on other channels and provide an easy to use data extraction/migration facility within the API
* Provide support for both local and Active Directory authentication/integration (LDAP)
* Allow for hosting and management of both primary and microsites
* Allow for implementation of additional services, being easy to update, develop and future proof
* Allow for secure customer and user data management including reports
* Comply with the latest industry security standards;
* Comply with WCAG 2.1AA accessibility standards

CRM/E-forms – The system should also:

* Provide excellent customer experience through having all interactions by customer in one place to view
* Provide contact management
* Allow our customers to report, book services, pay: online, by phone, face to face, etc.
* Potential to integrate with other back office systems and partner sites via use of APIs for in-house development & pre built integrations provided by the supplier.
* Permit the use of robotic process automation (RPA) on the solution should the functionality be needed to deliver operational needs.
* Have the facility to provide ‘one account’ functionality.
* Allow for implementation of additional services, being easy to update, develop and future proof
* Allow for secure customer and user data management including reports
* Comply with industry security standards;
* Provide reports and dashboards

Workforce Management System – The system should also:

* Allow flexible scheduling of multi-skilled telephony agents and face to face customer advisors
* Allow easy amendments to schedules after they have been published
* Allow automatic updates to be distributed to affected employees after amendments have been made
* Allow for secure logins for all licensed users
* Allow for varying levels of hierarchy to be set up and amended by permitted users

# Section 3: Supporting information

## Section A: Organisation and Contact Details

|  |  |
| --- | --- |
| **Question** | **Response** |
| Name of your organisation |  |
| Registered office (if applicable) |  |
| Trading address (if different from office) |  |
| What if any local connections do you have with the authority? |  |
| Name of person and job role to whom queries relating to this questionnaire should be addressed  |  |
| Telephone Number(s) |  |
| Email |  |
| Address if different to above |  |
| Please confirm size of organisation |  |
| Annual Turnover |  |
| What accreditation you hold |  |
| What capacity you have to take on new customers? |  |

# Section 4: Questions

Please complete all relevant sections dependent on the offerings you are able to provide. **Please tick to confirm the sections completed**

A: Website/Intranet\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

B: CRM/eForms\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

C: Workforce Management System\_\_\_\_\_\_\_

**Please restrict answers (where more than Yes/No is required) to a maximum of 500 words – diagrams and pictures to illustrate are welcomed**

## A: Website/Intranet

| **Question** | **Response** |
| --- | --- |
| 1. What is the name of the solution?
 |  |
| 1. What hosting options do you have and if you have a cloud option, which region do you use for hosting?
 |  |
| 1. How many local authority customers do you have in the UK?
 |  |
| 1. Please provide details of at least 3 local authority reference site(s) or customer(s) you are willing for us to approach ? Briefly describe the projects delivered for those councils and the timeframes
 |  |
| 1. Please detail your systems functionality and capability, what platform it sits on, the type of technology used (i.e. .Net/Java) and confirm that it can deliver the following:
2. Content schedule facility
3. Hierarchical structure of CMS (Classifying, categorising and associate content)
4. Held only once even if used many times
5. Archive and delete capability
6. Content change and immediate update with preview functionality
7. How statistics can be presented and categorises/options available
8. Validating
9. Document and image storage and categorisation
10. Content editing functionality
11. Delegation of content editing with centralised editorial control
12. Compliance with web & accessibility standards
13. Training provision
14. Data migration
15. Search functionality
16. A defined approach to testing & defect management
17. clear and sustainable support route
18. Integration with social networks
19. Active Directory integration for back office login
20. Open authentication OAuth 2.0 for end users
21. Google Analytics integration with anonymisation of user data
22. Fully customisable easily updated css styling
 | Please reply YES or NO |
| 1. Is the CMS available as a stand-alone solution, or does it come bundled with eForm and CRM functionality and is part of a suite of products?
 |  |
| 1. Please provide a technical architecture diagram you would recommend for a mid-sized unitary authority?
 |  |
| 1. Please provide a roadmap for your solution for the future and describe how the solution is future proofed?
	1. If you have a ‘Mobile first’ strategy for your products, please provide details
	2. Please include details of how product updates are applied if running locally or in cloud based environment
 |  |
| 1. Can you provide estimated costs for providing your solution to a mid-sized unitary authority including setup, design, hosting and support over a 5 year period?
 |  |
| 1. Please outline your implementation plan
 |  |
| 1. Please describe the support provision you offer
 |  |
| 1. Do you offer any Apps? If yes, please outline
 |  |
| 1. Does your solution provide an API, if so please provide the associated documentation?
 |  |
| 1. Does your solution also provide functionality to be used as an Intranet? If so, does a document sharing facility exist between intranet/website?
 |  |
| 1. Can you provide a feature list provided by your solution?
 |  |
| 1. Does your solution grant us permission to use provision of web chat functionality (within product or integrated to) on it if we find a need?
 |  |
| 1. Is your solution WCAG 2.1AA compliant?
 |  |

## B: CRM/eForms

| **Question** | **Response** |
| --- | --- |
| 1. What is the name of the solution?
 |  |
| 1. What hosting options do you have and if you have a cloud option, which region do you use for hosting?
 |  |
| 1. How many local authority customers do you have in the UK?
 |  |
| 1. Please provide details of at least 3 local authority reference site(s) or customer(s) you are willing for us to approach ? Briefly describe the projects delivered for those councils and the timeframes
 |  |
| 1. Please briefly outline the system capability and the functionality it provides:
	1. Reporting – output format and usability
	2. Search functionality
	3. Document and image storage and categorisation
	4. Access, security and levels of permission
	5. Business processes editing functionality
	6. Data migration
	7. Approach to testing & defect management
	8. Archive and delete capability
	9. Data retention settings
	10. Customer record – ability to track contact across different services/functions
 |  |
| 1. Please provide a roadmap for your solution for the future and describe how the solution is future proofed?
 |  |
| 1. Can you provide estimated costs for providing your solution to a mid-sized unitary authority including setup, hosting and support over a 5 year period?
 |  |
| 1. Can you provide a list of suppliers and products your solution has pre built integrations available for?
 |  |
| 1. Does your customer portal provide social sign in?
 |  |
| 1. Please outline your implementation plan
 |  |
| 1. Please describe the support provision you offer
 |  |
| 1. Does your solution support both authenticated and unauthenticated eForm submissions.
 |  |
| 1. Can you provide documentation for your solutions API?
 |  |
| 1. Can you provide feature list or documentation for your solution?
 |  |
| 1. Is your API REST or SOAP based?
 |  |
| 1. What is your strategy for data migration of existing data? What provisions do you have for exporting and importing from other systems? What formats can you take to translate old systems to new system?
 |  |
| 1. What database platform is the system on?
 |  |
| 1. What functionality comes as standard and what is the extent of the customisation available to us?
 |  |
| 20. What is the process and cost to get Customer Development from you to customise the platform? |  |
| 21. Are there any limitations with your solution that we need to be aware of? |  |

## C. Workforce Operating System

| **Question** | **Response** |
| --- | --- |
| 1. What is the name of the solution?
 |  |
| 1. What hosting options do you have and if you have a cloud option, which region do you use for hosting?
 |  |
| 1. How many local authority customers do you have in the UK?
 |  |
| 1. Please provide details of at least 3 local authority reference site(s) or customer(s) you are willing for us to approach? Briefly describe the projects delivered for those councils and the timeframes
 |  |
| 1. Please briefly outline the system capability and the functionality it provides:
	1. Access, security and levels of permission
	2. Approach to testing & defect management
	3. Forecasting capabilities
	4. Staff scheduling capabilities – teams, skillsets, ad hoc
	5. User management
	6. Advisor activity tracking
	7. Performance management
	8. Staff request management (including annual leave)
 |  |
| 1. Please provide a roadmap for your solution for the future and describe how the solution is future proofed?
 |  |
| 1. Can you provide estimated costs for providing your solution to a mid-sized unitary authority including setup, hosting and support over a 5 year period?
 |  |
| 1. Can you provide a list of suppliers and products your solution has pre built integrations available for?
 |  |
| 1. Please outline your implementation plan
 |  |
| 1. Please describe the support provision you offer
 |  |