

TORBAY COUNCIL

Part 4 Award Questionnaire

Contract Reference

TTRAN3220

Contract Title

**Customer Relationship Management (CRM)
System**

Procurement Procedure

Restricted

Maximum Period of Contract

8 Years

Return Date

24 March 2021

Return Time

12:00 Noon

Return To

www.supplyingthesouthwest.org.uk

Applicant Name

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Stage Two – Award

Section A. Pass / Fail Criteria

The questions within this section shall be assessed on the basis of pass or fail.

Question Number	Questions	Response
1	<p>The Council's data must not be transferred to a country or territory outside the European Economic Area, unless that country or territory ensures an adequate level of protection for the rights and freedoms of data subjects in relation to their personal data. Please confirm that the organisation will comply with any changes in data protection legislation put in place post Brexit.</p> <p>Minimum Requirement:</p> <p>A positive response constitutes a pass for this question.</p>	Yes / No
2	<p>Please confirm that your solution can meet all 'must have' Specific Requirements within Part 2 Specification</p> <p>Minimum Requirement:</p> <p>A positive response constitutes a pass for this question.</p>	Yes / No

Section B. Method Statements

Applicants are required to submit Method Statements. They should be drafted in such a manner so as to be able to form part of the Contract. They should be submitted containing sufficient detail to demonstrate that the stated outcomes will be deliverable, as defined within Part 2 Specification.

Responses must be relevant to the question and appropriate in length. Supporting information may be submitted, provided that it is clearly labelled, referenced in the question to which it relates and appended to the main submission.

The evaluation of the response will not go beyond the word limit that has been set, if applicable.

Method Statement Number	Method Statement	% Score
1	<p><u>Solution Summary</u></p> <p>Please provide a summary of your proposed solution.</p> <p>Your response should cover as a minimum but not be limited to the following:</p> <ul style="list-style-type: none"> • Your proposed service offering to us to meet our requirements; • Confirmation that your proposal has taken into account potential customer usage based upon the sizing of Torbay’s population & outline demographics, and the set of Council services that are in focus; • Confirmation that the listed requirements can be met, and specific note of requirements that you cannot meet due to gaps in your service offering; • Optional services that are available at extra cost; and • Services that you cannot price accurately at present due to insufficient information from us. <p>Evidencing Compliance</p> <p>Referenced appendices to accompany your response to this question must include:</p> <ul style="list-style-type: none"> • A high level project plan detailing activities to be undertaken at key milestones in the project, clearly highlighting timescales, resources and responsibilities; and 	6.00%

- | | | |
|--|---|--|
| | <ul style="list-style-type: none">• A risk register detailing any potential challenges to service implementation, accompanied by proposed measures to prevent, overcome or mitigate them. | |
|--|---|--|

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Response:

<p>2</p>	<p><u>Enhanced Web portal</u></p> <p>Describe how your proposed CRM system delivers against the high-level requirement of section 1.4.1 of Part 2 Specification and also give consideration to the Requirement Overview in section 2 of Part 2 Specification.</p> <p>Your response should address but not be limited to the following Specific Requirements stated in section 3 of Part 2 Specification:</p> <ul style="list-style-type: none"> • Artificial Intelligence (3.1) • Beta Delivery & Testing (3.3) • Business Intelligence (3.4) • Content and Data Migration (3.5) • Device and Browser (3.6) • Golden Record (3.7) • Integration (3.8) • Mobile Working (3.9) • Modernisation (3.10) • Service Aspirations (3.11) • Technology Infrastructure Hosting (3.12) <p>Supporting evidence may be submitted as appendices, provided that they are clearly referenced in your response.</p> <p>Page Limit – 5 pages of A4 at Font size 12 (including appendices)</p>	<p>6.00%</p>
<p>Response:</p>		

<p>3</p>	<p><u>Proactive approach</u></p> <p>Describe how your proposed CRM system delivers against the high-level requirement of section 1.4.2 of Part 2 Specification and also give consideration to the Requirement Overview in section 2 of Part 2 Specification.</p> <p>Your response should address but not be limited to the following Specific Requirements stated in section 3 of Part 2 Specification:</p> <ul style="list-style-type: none"> • Artificial Intelligence (3.1) • Audit (3.2) • Business Intelligence (3.4) • Golden Record (3.7) • Integration (3.8) • Modernisation (3.10) • Service Aspirations (3.11) • Technology Infrastructure Hosting (3.12) <p>Supporting evidence may be submitted as appendices, provided that they are clearly referenced in your response.</p> <p>Page Limit – 5 pages of A4 at Font size 12 (including appendices)</p>	<p>6.00%</p>
<p>Response:</p>		

<p>4</p>	<p><u>Reduce duplication</u></p> <p>Describe how your proposed CRM system delivers against the high-level requirement of section 1.4.3 of Part 2 Specification and also give consideration to the Requirement Overview in section 2 of Part 2 Specification.</p> <p>Your response should address but not be limited to the following Specific Requirements stated in section 3 of Part 2 Specification:</p> <ul style="list-style-type: none"> • Audit (3.2) • Golden Record (3.7) • Integration (3.8) • Modernisation (3.10) • Service Aspirations (3.11) <p>Supporting evidence may be submitted as appendices, provided that they are clearly referenced in your response.</p> <p>Page Limit – 2 pages of A4 at Font size 12 (including appendices)</p>	<p>3.00%</p>
<p>Response:</p>		

<p>5</p>	<p><u>Performance reporting</u></p> <p>Describe how your proposed CRM system delivers against the high-level requirement of section 1.4.4 of Part 2 Specification and also give consideration to the Requirement Overview in section 2 of Part 2 Specification.</p> <p>Your response should address but not be limited to the following Specific Requirements stated in section 3 of Part 2 Specification:</p> <ul style="list-style-type: none"> • Audit (3.2) • Beta Delivery & Testing (3.3) • Business Intelligence (3.4) • Golden Record (3.7) • Integration (3.8) • Modernisation (3.10) <p>Supporting evidence may be submitted as appendices, provided that they are clearly referenced in your response.</p> <p>Page Limit – 2 pages of A4 at Font size 12 (including appendices)</p>	<p>3.00%</p>
<p>Response:</p>		

<p>6</p>	<p><u>Commercial</u></p> <p>Provide a narrative to explain your methodology behind your Part 5 Pricing submission.</p> <p>Your response should include as a minimum but not be limited to the following:</p> <ul style="list-style-type: none"> • how you have identified software modules currently in use by the Council that could be switched off /replaced; • the benefits of switching off/replacing identified software modules; • how you will facilitate switching off/replacing identified software modules; and • how you will measure success. <p>Please highlight any specific recommendations that are relevant to our capacity and performance needs.</p> <p>Financial information, including costs for any additional modules required should be including in the Part 5 Pricing submission.</p> <p>Please Note: If your solution includes replacement of the Revenue and Benefits system, you must refer to the additional requirements for this system stated at Appendix F Tax Collection & Benefits Requirements and provide as a referenced appendix details about this system, confirming that you can meet all 'must have' requirements.</p> <p>Page Limit – 4 pages of A4 at Font size 12 (excluding appendices)</p>	<p>6.00%</p>
<p>Response:</p>		

<p>7</p>	<p><u>Mentoring, Training and Support</u></p> <p>Describe the professional services resources you intend on providing to support the Council, being clear on who is responsible for what as aspects may be shared activities.</p> <p>Your response should address but not be limited to section 4 of Part 2 Specification and the following Specific Requirements stated in section 3 of Part 2 Specification:</p> <ul style="list-style-type: none"> • Beta Delivery & Testing (3.3) • Content and Data Migration (3.5) <p>Supporting evidence may be submitted as appendices, provided that they are clearly referenced in your response.</p> <p>Page Limit – 2 pages of A4 at Font size 12 (including appendices)</p>	<p>2.00%</p>
<p>Response:</p>		

Section C. Technical Questions

Applicants are required to submit their responses to the following Technical Questions. They should be drafted in such a manner so as to be able to form part of the Contract. They should be submitted containing sufficient detail to demonstrate that the stated outcomes will be deliverable, as defined within Part 2 Specification.

Responses must be relevant to the question and appropriate in length. Supporting information may be submitted, provided that it is clearly labelled, referenced in the question to which it clearly relates and appended to the main submission.

The evaluation of the response will not go beyond the word limit that has been set, if applicable.

Technical Question Number	Technical Question	% Score
1	<p><u>Core Capability</u></p> <p>Describe what pre-built integrations for line-of-business solutions are available and whether there are any additional charges, such as use of APIs, which are related to these.</p> <p>Your response should describe but not be limited to:</p> <ul style="list-style-type: none"> • Your capability to integrate with external data sources, including REST web services; • Integration with address and geographic data sources, appointments booking solutions, document management and other CRM solutions; • Pre-built integration solutions with common line-of-business solutions in the UK local government market; and • Provision of external API for personalised content and transactions. <p>Supporting evidence may be submitted as appendices, provided that they are clearly referenced in your response.</p> <p>Page Limit – 5 pages of A4 at Font size 12 (including appendices)</p>	6.00%
<p>Response:</p>		

<p>2</p>	<p><u>Security</u></p> <p>Describe how your organisation & proposed CRM system deliver against the requirements of section 5 of Part 2 Specification.</p> <p>Your response should address as a minimum but not be limited to the following:</p> <ul style="list-style-type: none"> • Functionality (5.1) • Standards (5.4) • Data Transfer (5.5) <p>Evidencing Compliance</p> <p>You need to provide copies of the PCI DSS certificate and any additional certifications as appendices to accompany your response to this question.</p> <p>Page Limit – 2 pages of A4 at Font size 12 (excluding appendices)</p>	<p>2.00%</p>
<p>Response:</p>		