

Expression of Interest

Contract Reference

TTRANS3220

Contract Title

**Customer Relationship Management
(CRM) System**

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The Expression of Interest Documents can be made available in other formats. For further information please submit your request through the messaging facility on the Supplying the South West e-Tendering Portal

1 Procurement Information

1.1 Procurement Procedure

Torbay Council is intending to undertake a Procurement following the Open Procedure as outlined within the Directive (2014/24/EU) and implemented in the United Kingdom by The Public Contracts Regulations 2015 (SI 2015/102) for a long-term agreement to supply, implement and maintain a customer relationship management (CRM) system.

We are seeking expressions of interest from interested Suppliers capable of meeting the Council's needs. A high level specification can be found at section 2 of this document.

1.2 Draft Procurement Timetable

Procurement Stage	Dates
Issue Expression of Interest	Tuesday 01 September 2020
Deadline for Submission of Expressions of Interest	Tuesday 29 September 2020 12:00 Noon
Tender Documents Published	Monday 04 January 2021
Tender Submission Date & Time	Friday 05 February 2021 12:00 Noon
Evaluation Period (including system demonstrations)	Monday 08 to Friday 19 February 2021
Contract Award Notification	Thursday 29 April 2021
Contract Implementation Phase Commences	Monday 26 July 2021

Please note: this draft timetable for the Procurement is indicative at this stage and may be subject to change.

1.3 Procurement Process

The Procurement will be undertaken through the Council's e-tendering portal ProContract (www.supplyingthesouthwest.org.uk).

Details on how to register on ProContract can be found in Appendix A ProContract User Guide.

2 High Level Specification

The Council is seeking to purchase a system capable of meeting the following requirements:

- (a) Web portal and case management;
- (b) 360 degree view of customers and locations, with activity tracking and cross-organisation alerts based on business rules;
- (c) Customer web portal including digital forms and flows with multi-channel access compatibility to fully digitise processes and allow customers to track progress;
- (d) A common platform for front and back office processes;
- (e) Integration with LLPG and postcode look-up capability visualised through online maps;
- (f) Full integration enabled for LOB systems to iteratively move towards a golden record for customer and place through a Master Data Management (MDM) approach, clustered or organisation wide;
- (g) Outlook integration for diary management and scheduling;
- (h) Management and operational reporting functionality, or full integration with MS Power BI to enable the above;
- (i) Integration with telephony software; and
- (j) Hosted or hybrid system.

In addition to the above requirements, which will be identified in more detail during the Procurement process, systems will also be evaluated in relation to:

- (a) User experience;
- (b) Training package / documentation, including delivery times;
- (c) The Supplier's proposals in relation to data migration from the Council's existing systems where they can be replaced;
- (d) The Supplier's future plans for system development;
- (e) Meets Council retention periods; and
- (f) Meets Council's information security requirements.

3 Expression of Interest

Suppliers are required to complete and return Appendix B Expression of Interest.

Expression of Interest forms must be returned through the messaging facility on the ProContract e-tendering portal (www.supplyingthesouthwest.org.uk) or by email to procurement.team@torbay.gov.uk by 12:00 Noon on Tuesday 29 September 2020.