



**Dorset Local Enterprise
Partnership**

Tender Specification

**Dorset Gateway:
Customer Relationship
Management (CRM) System**

March 2020

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1. BACKGROUND

- 1.1. Dorset Local Enterprise Partnership (LEP) has been awarded funds by the Department for Business, Energy and Industrial Strategy (BEIS) to provide a dedicated Customer Relationship Management (CRM) System.
- 1.2. The purpose of the Dorset Gateway CRM system is to facilitate and optimise interactions with existing and new stakeholders across the organisation to deliver the core Dorset Gateway function.
- 1.3. The Dorset Gateway seeks to do this through sourcing a CRM system that meets all of its key objectives outlined in section 3.

2. BUDGET AND DURATION

- 2.1. The contract is to run from 1st April 2020 until 31st March 2021 in the first instance.
- 2.2. There will be an option to extend the contract annually which would be triggered by Dorset LEP.
- 2.3. Any offer to extend the contract will be made with a minimum of one month's notice, prior to the expiration of the existing original term.
- 2.4. The budget allocated is up to £12,500 per annum exclusive of any VAT charges that the supplier might incur.

3. OBJECTIVES

- 3.1. The Dorset Gateway CRM system needs to be a highly configurable and scalable cloud-based system, able to be tailored to meet current and future requirements of the organisation.
- 3.2. At a minimum, the Dorset Gateway CRM system will need to possess the following key functions:
 - Client Relationship Management (CRM)
 - Enquiry and workflow management
 - Funding and grant management
 - Employment and skills programme management
 - Reporting and data visualisation tools/functionality
 - Commercial property database/online portal
 - E-newsletters and online surveys

- Events management and online booking Portal

4. OUTPUTS

4.1. At a minimum, it is expected that the contract will include the following:

- Initial training for all users to fully understand how to utilise the system
- Unlimited helpdesk support via email and telephone
- Access to online webinars
- Software and database hosting backed up by a Service Level Agreement
- Online system documentation and guidance
- Ongoing system configuration
- Product upgrades and new versions

4.2. The Dorset Gateway CRM system provider will offer a selection of license packages to allow the option of a number of licences to be shared across a group of users.

4.3. The Dorset Gateway CRM system provider will provide the facility to add additional user licences at any stage if required.

4.4. The Dorset Gateway CRM system provider will provide a bespoke development service on an ad-hoc basis if required.

4.5. The Dorset Gateway CRM system needs to be fully integrated to perform the above outlined key functions starting from 1st April 2020.

5. CONTRACT MANAGEMENT AND MONITORING

5.1. The work will be overseen by Dorset LEP's Business Engagement and Dorset Gateway (BEDG) Manager.

5.2. The supplier should nominate a dedicated point of contact to act as Contract Manager to oversee the work and liaise with and report into the BEDG Manager.

5.3. Dorset LEP requires a high level of accuracy in this piece of work, particularly in relation to the data and management information provided. The Contract Manager is responsible for ensuring the quality of the work and the accuracy of the information provided.

6. TIMETABLE

Invitation to Tender	13 March 2020
Deadline for the submission of Tenders	23 March 2020 – 18:00 hrs
Appointment	Week Commencing 25 March 2020
Inception meeting	Week Commencing 27 March 2020
Contract start date	1 st April 2020

7. TENDER ASSESSMENT AND COMMISSIONING PROCEDURE

7.1. Tenders must include:

- An Explanation of the **process** for Enquiry and workflow management
- Details of any **systems** will be in place to ensure the solution can be integrated with other applications – e.g. integration with Microsoft Outlook
- The **resources** you will have in place to ensure that you are able to offer all of the services listed in tender application. This will include the name of any individual/individuals who will work on the contract, their role, the amount of time to be spent on the work and a summary of their qualifications and relevant subject knowledge and experience; full CVs are not required
- A breakdown of **costs** under headings of licence type (broken down by number of user licences), any incentivised contractual service discounts and any additional costs e.g. bespoke development, additional training etc.
- Information that will assist us with our **due diligence** process including:
 - Evidence of completing similar work;
 - Details of any conflicting or complementary work which you may be undertaking at the same time;
 - Confirmation of professional indemnity insurance, including amount of cover held; and
 - Contact details for two references.

7.2. Evaluation criteria

Supplier selection will be made at the discretion of Dorset LEP.

Scoring weightings are broken down as follows:

- Process – 20%
- Systems – 20%
- Resources – 20%
- Price – 20%
- Due Diligence – 20%

7.3. Scoring criteria

4 Excellent	Proposal meets and, in some places, exceeds the required standard
3 Good	Proposal meets required standard
2 Acceptable	Proposal meets the required standard in most respects, but is lacking or inconsistent in others
1 Poor	Proposal falls short of expected standard
0 Unacceptable	Completely or significantly fails to meet required standard or does not provide the relevant answer

Dorset LEP reserves the right not to make any appointment.

8. TENDER GUIDANCE

8.1. Developing and submitting your quote

- Take the time to read and understand this document
- In particular, develop a strong understanding of the objective and outputs sections
- In structuring your response, consider how it will be evaluated
- If anything is unclear or you have any questions please direct these to our point of contact, Finn Morgan, via email in the first instance to fmorgan@bournemouth.ac.uk
- Your response must be submitted via email for the attention of Finn Morgan to gateway@bournemouth.ac.uk by no later than **18:00, 23rd March 2020**
- Responses may be submitted at any time before the deadline but late responses will not be accepted under any circumstances

8.2. Conflicts of Interest

Dorset LEP may exclude the supplier if there is a conflict of interest which cannot be effectively remedied. The concept of a conflict of interest includes any situation where relevant staff members have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.

Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the supplier to inform Dorset LEP, detailing the conflict in the supplier response to Dorset Gateway Custom Relationship Management (CRM) Tender.