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| --- | --- |
| Project | Engage Web: CRM/Sales/Project Mgt System |
| Company name | Sheer Media Ltd T/A Engage Web |
| Date of Issue | 2nd December 2021 |
| Reference Code | N/A |
| Email for Return of Complete Responses | l.wilkinson@engageweb.co.uk |
| Submission Deadline | 16th December 2021 5pm |

## REQUEST FOR QUOTATION

## SPECIFICATION

Any questions about the procurement should be submitted by e-mail to the email address indicated at the front of this document**.**

# bACKGROUND TO Cheshire & Warrington Access to Finance & Grant Programme

The project outlined in this Request for Quotation will be part funded by the Access to Finance & Grant Programme Application Form

The grant programme is designed to support businesses in identifying and achieving their growth potential through the provision of up to 32% contribution towards the cost of projects across a wide spectrum of business disciplines.

The specification below relates to a project which may be part funded by Cheshire West & Chester Council, Warrington & Co and the European Regional Development fund. However, this will have no impact on the contractual relationship between the business letting this contract and the successful supplier.

Please note, response to this submission is at the sole cost of the supplier and is not an offer of employment.

Further information can be found at [www.blueorchid.co.uk/a2fgrant](http://www.blueorchid.co.uk/a2fgrant)

**PLEASE NOTE: ALL CORESPONDENCE REGARDING THIS PROCUREMENT SHOULD BE DIRECTED TOWARDS THE CONTRACTING BUSINESS.**

# Background TO oRGANISATION & requirements of the brief

**Company Background**

Engage Web offers web design and development, and digital marketing to a range of organisations from SMEs to agencies and companies in the US, Australia and Canada. Digital marketing services include search engine optimisation (SEO), Facebook Ads, Pay-Per-Click (PPC) and copywriting services that range from one-off pieces to web copy to regular monthly articles. The company is co-owned by Lianne Wilkinson and Darren Jamieson and has been operating since 2009.

Engage Web currently uses and will continue to do so:

* MS Office365 products
* SharePoint

The existing CRM/Project Management system is a legacy one, doesn’t do all that we need now the team is larger, and could be made defunct at any time. The company uses ActiveCampaign for email marketing to its own mailing lists. A spreadsheet is used to track and report on leads and sales.

**Requirements of the Brief**

To build a bespoke system to act as a CRM, project management tool and sales tracker for Engage Web.

The system should track and monitor the lifecycle of a client from enquiry to proposal to sale to management of the service to end of life.

Managers should be able to monitor team member’s workloads/meetings to ensure they have sufficient work but are not overloaded.

Directors should be able to report on each stage of a sale (we use LAPS: Leads, Appointments, Proposals, Sales) and understand volume, conversions and soft data such as why we did/didn’t win a contract.

Each aspect of the proposed system is broken down below:

**Contact Relationship Management (CRM)/Sales tracking:**

**Contacts:**

* Log the details of clients, prospects, business contacts and companies
* Categorise contacts accordingly (using bespoke multiple tags, such as active/inactive, how they heard of us and what services they have)
* Allow us to record multiple phone numbers/email addresses against a person’s record
* Be able to group contacts and set permissions for users to see various groups – example groups: Sales, Clients, Suppliers, Management.

Desired: To be able to feed this data into our ActiveCampaign system if we have permission to do so, for email marketing.

**Emails:**

* Be able to bcc the system, and have a copy of the email saved to the database. This allows any user with permission to view that record to see and find emails from other people/previous employees.

Desired: Stored emails can currently be printed in PDF and attached to an email. It would be good to be able to forward them using MS Outlook.

**Prospects:**

* To log the details and source of sales enquiries, meetings/appointments/calls, proposals done, proposal status/outcome, and schedule follow-ups.

**Tasks/Outputs:**

* Ability to run a report by date range on activities to see:
  + Number of proposals won/lost for what services
  + Where leads came from
  + Value of leads/project
  + Who was responsible, and other such sales reporting statistics for analysis.
* Ability to filter and export data in csv format
* Ability to complete a Proposal Request against a contact and notify/assign it to another user as a task (e.g. against the contact’s Quotes & Proposals tasklist)
* Ability to add/remove fields to this as required
* When setting meetings, option to send an update to the person and, if so, it should send a calendar invite so the person can accept and have it appear in their Outlook calendar.
* Ability to set one-off/recurring tasks (see below) or meetings. These should appear in the appropriate person(s) workload list (see below) for as far ahead as the task is set. Our current system shows the recurring task singular against the tasklist

Desired: Ability to set recurring tasks on set days, e.g. 21st of each month, on set days of the week, e.g. every Tuesday, or on every fourth Thursday if possible.

Highlight where a set date means it falls on a weekend so the user can choose to move it then (the office is closed on weekends, although we may run the odd weekend event/webinar).

**Views:**

* Ability to filter contacts based on clients/prospects and what services they have/were proposing to have.

**Project Management Section:**

**Projects:**

* Create new projects
* Tag and filter projects by bespoke tags
* Add top-level project notes (Background)
* Create new fields where needed
* Ability to set up project templates, e.g. with standard tasks for a ‘Web Design’ project, and insert those tasks into any project. Tasks in those templates should automatically set with the appropriate spacing, e.g. Design call on Day 1, Mock up on Day 7, Client Amends to Mock up on Day 14. If we change the date of a particular task in a template, the option should be offered to move all dependent tasks forward at the same rate, ignoring weekends, e.g. if task 2 is set for 5 working days after task 1 and task 1 is moved, the system should ask if we want to move the dependent tasks as well.

**Tasklists:**

* Ability to add Tasklists to a contact or to a project to group specific tasks, e.g. Quotes & Proposals for contacts, SEO Work December or Web Redesign 2022 for a project
* Tasks should have fields such as:
  + Title
  + Description
  + Colour Code
  + Person(s) responsible
  + Option to notify the person(s) or not as the task is added
  + Task time done and remaining
  + Due date
  + Reason on hold
  + Option to remind the person(s) X mins or X days before date due
  + On completion send notification email to {insert email addresses}
* Ability to add comments to a task and select a person to send a copy of that comment via email
* Within the comment, see which other users it was sent to
* Ability to log time against a task.

**Workload:**

* Ability to view a person’s or multiple persons’ workload on a single screen in a tick list format
* Ability to change the size of any column
* In the workload list, this should display any tasks/meetings set for that person(s)
* Any person should be able to view another person’s workload list
* Fields we’d like to see are:
  + Task colour code (e.g. orange to represent ‘on hold’, etc)
  + Task name
  + Time remaining
  + Task description
  + Who/what the task is for (i.e. is it set against a contact, a company or a project/tasklist)
  + Person(s) responsible
  + Due date
* These should be grouped by day for this week and next week with total time added up beneath, and then in weeks moving forward.
* To move a date/update any field from the workload list, we should be able to double-click and update it, or click on the contact/company/project to go to the fuller record and update from there

Desired: Ability to view and update the system on a mobile device

**Budget**

£40,000 + VAT

**Expected Start Date: February 2022**

**Expected End Date: June 2022**

|  |  |
| --- | --- |
| **I certify that this is a true copy of the original document.** | |
| Name | **Lianne Wilkinson** |
| Signed | A picture containing text, metalware, jewelled headdress, chain  Description automatically generated |
| Position | Managing Director |
| Date | 1st December 2021 |

**IMPORTANT**

NOTE TO SUPPLIERS

This tender includes services which will be part funded by Public Funding as such strict procurement rules apply.

In responding to this tender the following requirements apply;

* Complete the Tender Response form below. Failure to complete the form below will result in your tender being rejected.
* When completing the Tender Response Form include complete and accurate responses to the questions. Whilst supporting material may be included scoring will be conducted on the information within the form therefore responses which simply refer or link to other material may score low.
* Supporting materials e.g. CV’s must be provided as an attached or embedded file not a link to a website. Links to published online case studies are acceptable.
* All tenders must be received by the deadline in a form which cannot then be altered, as such linking to a cloud or website hosted tender response will result in your tender being rejected.
* The ERDF grant associated with this tender has a number of restrictions on its use e.g. ongoing business costs such as maintenance contracts; outsourced services; registration or certification fees. Please ensure that pricing information allows assessors to identify what costs/services are included.
* Whilst we understand that you may wish to speak to the commissioning business to discuss elements of the tender the grant application process requires that tender scoring be clearly based on written material provided within the tender response, as such we will instruct the tendering business that information provided within any calls cannot form part of their scoring decision.

SUpplier REsponse Section

**Information Only**

|  |  |
| --- | --- |
| Company Name |  |
| Contact Name |  |
| Company Registration Number |  |
| VAT Number |  |
| Contact Telephone Number |  |
| E-mail address: |  |
| Web Address |  |
| List any attachments that you have included with your tender e.g. Curriculum Vitae, Organisational Background and Case Studies to support proposal. |  |
| References  *If possible, please include the contact details of two previous clients who would be willing to act as a reference to the quality of your work.* | **Reference 1.** |
| **Reference 2.** |

**Scored Response – Quality**

|  |  |  |  |
| --- | --- | --- | --- |
| *This is a minimum threshold Question – See Evaluation Criteria in Appendix I* | | | |
| Please outline your experience in delivering the services described in the in the section titled ‘Requirements of the Brief’  **Available Marks: 10** | | | |
| INSERT NARRATIVE to clearly demonstrate how you meet the requirements of brief as set out above. (Max 3,000 words). | | | |
| Please outline your delivery plan including your approach to delivering the services described in the in the section titled ‘Requirements of the Brief’ | | | |
| INSERT NARRATIVE to clearly demonstrate how your approach will meet the requirements of brief as set out above. (Max 3,000 words). | | | |
| **Project Milestone** | **Time Required** | **Expected Completion Date** | **Total Cost for this activity** |
| 1. |  | *No of Days* |  |
| 2. |  |  |  |

**ADD MORE ROWS IF REQUIRED**

|  |  |  |
| --- | --- | --- |
| **Cost** | Please provide your cost exc VAT | |
|  | Where the services being tendered include a number of separate elements, for example a Sales Project which includes a Sales & Marketing Strategy and development of an E-commerce website, please provide separate costs for each element below. | |
|  | **Type of Service,**  e*.g. Consultancy, Software, Branding, etc.* | **Cost** |
| **Element 1** |  | £ |
| **Element 2** |  | £ |
| **Element 3** |  | £ |
| **Total Cost** | | £ |

**ADD MORE ROWS IF REQUIRED**

**Payment Terms**

Please insert your preferred payment terms using the following table as guidance.

|  |  |  |
| --- | --- | --- |
| **Payment** | **When** | **Amount** |
| 1. | *On completion of INSERT TEXT* | £ |
| 2. | *On completion of INSERT TEXT* | £ |

Please note:

* All prices quoted shall be exclusive of Value Added Tax (VAT).
* All prices quoted shall be fixed and firm and shall apply for the full duration of the contract.
* Following that period, any requests for price changes must be accompanied by a written summary and supported by evidence to justify the proposed price change.
* No quantity or continuity of work is guaranteed to successful suppliers and this should be taken into account when completing the Pricing Schedule.
* Any daily rate indicated in the Schedule of Rates is for an 8 hour working day, during a normal working week (Monday to Friday). A half day is therefore considered as 4hrs.
* All costs are deemed to include expenses and any other on-cost.

Appendix I

# Instructions for Completion

Completed questionnaires should be submitted in electronic format and emailed to the email address given at the front of this document by the due date as outlined in Deadline for Response in the Timescales section.

Any application received after the Deadline for Response shall not be opened or considered. We may, however, in our own absolute discretion extend the Deadline and in such circumstances we will notify all applicants of any change.

You should answer all questions as accurately and concisely as possible.

Where a question is not relevant to your organisation, please state N/A (not applicable) and include a brief explanation if required. Questions must be answered in English and submitted either in Microsoft Word readable format or Adobe Acrobat PDF.

Responses will be evaluated in accordance with the criteria set out in Appendix 1. In the event that none of the responses are deemed satisfactory, wereserve the right to consider alternative procurement options.

Failure to provide the required information, make a satisfactory response to any question, or supply documentation referred to in responses, within the specified timescale, may mean that you will be excluded from further participation in the procurement.

# No Contract

No information contained in this specification or in any communication made between ourselves and any supplier in connection with this specification shall be relied upon as constituting a contract, agreement or representation that any contract shall be offered in accordance with this specification. We reserve the right, subject to the appropriate procurement regulations, to change without notice the basis of, or the procedures for, the competitive tendering process. We reserve the right to terminate the process at any time. Under no circumstances shall ourselves incur any liability in respect of this specification or any supporting documentation.

# Supplier Selection

The overall evaluation process will be conducted in a fair and equitable manner, so that we are able to consider the value for money of each proposal. This means that we may seek clarification of an application from any and all applicants; different clarification/information may be sought from different applicants.

Once we have reached a decision in respect of an award, we will notify all applicants of our decision. As this is below the OJEU financial threshold for light touch regime procurements, we do not intend to provide for a standstill period before entering into the contract.

Any attempt by applicants to influence the contract award process in any way may result in the applicant being disqualified. Specifically, applicants shall not directly or indirectly at any time:

* Devise or amend the content of their application in accordance with any agreement or arrangement with any other person (other than in good faith with a person who is a proposed partner, supplier, consortium member or provider of finance.)
* Enter into any agreement or arrangement with any other person as to the form or content of any other application, or offer to pay any sum of money or valuable consideration to any person to effect changes to the form or content of any other application.
* Enter into any agreement or arrangement with any other person that has the effect of prohibiting or excluding that person from submitting an application.
* Canvass us or any of employees or agents in relation to this tender.
* Attempt to obtain information from any of our employees, agents or our advisors concerning another application.

# Queries about the procurement

Any questions about the procurement should be submitted by e-mail to the email address indicated at the front of this document**.**

If we consider any question or request for clarification to be of such significance that all potential suppliers who have responded should be made aware of it, both the query and the response will be communicated to them, in a suitably anonymous form either by email or on the website/publication on which the tender was advertised.

All responses received and any communication from service providers will be treated in confidence.

Evaluation Criteria

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| --- | --- |
| Proposal significantly exceeds requirements and offers value added and additional services that will enhance significantly the service | 10 marks |
| Proposal exceeds requirement. Demonstrated by clear, detailed information and unequivocal evidence | 7.5 Marks |
| Proposal meets the minimum requirements. Evidence is fairly clear and convincing; minor reservations in one or more key areas | 5.0 Marks |
| Proposal significantly fails to meet the requirements. In virtually all areas there is a lack of convincing evidence which casts serious doubt about the ability to meet requirements. | 2.5 Marks |
| Responses scoring 0 will be deemed to have failed to demonstrate the minimum level of quality and will be disqualified. | 0 Marks |

Prior to evaluating Tenders, we will carry out an initial review of each Tender to confirm completeness and compliance with the Tender Requirements and may, at its discretion, reject a Tender which is incomplete and / or non-compliant. The following pre-evaluation process will be undertaken:

* **Compliance Check Stage:** to confirm completeness and compliance with the Tender Requirements. We may, at our discretion, reject a Tender which is incomplete or non-compliant. Please note the word count and any text above the word count will not be assessed.
* **Quality Assessment Score:** The quality assessment section will be assessed against the criteria set out below and each tender will be awarded a score based on their ability to demonstrate their ability to meet the tender requirements.

Responses scoring below 5 in the quality assessment will be deemed to have failed to demonstrate the minimum level of quality and will be disqualified.

* **Tender Price Score:** This is calculated using the formula shown below and a score will be awarded which reflects the cost quoted relative to the other tenders received.
* **Evaluation Stage:** We will then determine the winning tender by comparing the total scores for both the quality assessment and pricing sections.

### PRICE

In evaluating the price of tenders, the lowest price will be awarded full marks and each other proposal will be awarded a score based on the percentage difference from the lowest price, according the formula below;

See worked example below.

If the price seems abnormally low, further explanation as to the low price may be sought and evaluation of whether the quote is considered economically viable will be made.