



advice and support for older age
**Independent
Age**

REQUEST FOR TENDER FOR:

CRM SOLUTION MS DYNAMICS OR SALESFORCE

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Section 1. Background and conditions of the project

1.1 About the project

Independent Age are seeking a business partner to work alongside the organisation to establish an CRM for our Wellbeing Service. We have undertaken a process whereby we have significantly defined our requirements. We intend to implement this CRM and volunteer portal to achieve the following business objectives:

- ✓ **Improve productivity:** Our staff and volunteers need systems that are user-friendly, workflow-driven, customisable, automated and integrated to reduce unnecessary administrative burdens, facilitate ‘just in time’ task management and facilitate real-time business intelligence.
- ✓ **Improve and expand relationship management:** Our staff need systems that enable its respective teams to support and collaborate with prospective and current volunteers through various stages of the volunteer life cycle, and leverage self-service functionality and automated journeys to provide a scalable, engaging experience for them
- ✓ **Improve and scale service delivery:** We intend to introduce new services and grow existing services. Processes, marketing automation, data flows and digital experiences need to be engineered so that Independent Age can scale and customise without needing to procure outside consultancy or incur one-off software costs.
- ✓ **Facilitate collaboration and a single source of truth:** We need a system that can facilitate collaboration across teams and with volunteers, including case management, queues, approvals, data visualisation, integration with 3rd party data sources, reporting tools (e.g. Power BI) and prioritisation.
- ✓ **Provide a foundation for sustainable growth:** We need a system that can be extended to support future business objectives and consumer (i.e. volunteers, supporters, service users) changing digital habits; this includes a system with an established ecosystem of 3rd party applications, robust APIs, comprehensive system technical documentation, responsive software support, competitive consultancy market, and proven market-leading product roadmap execution.
- ✓ **Enable system ownership:** We need to be able to design, build and support external-facing user journeys without being limited by system capabilities; this includes being able to create and edit any field, object, API, community portal page (or any other external-facing page) in-house with minimal coding requirements.
- ✓ **Support new teams and new users:** We need a system that can be extended to support other teams in the future and be capable of managing customised user settings, such as permissions, security settings and single sign on with other systems.
- ✓ **Compliance and Safeguarding:** We need a system that ensures processes, people and data management complies with data protection legislation (i.e. PECR and GDPR) and internal safeguarding requirements; this needs to include audit trails for data access and edits, advanced security settings, automated escalation rules and workflows that enforce best practice.

Independent Age has identified its preferred CRM solutions – MS Dynamics or Salesforce - that will allow us to grow into its current service ambitions, as well as future proof us against changes in systems, regulations and technology – and grow to meet the demands of our current Business Plan and, ultimately, continue to support older people. The criteria covered the following capabilities:

Requirement
Established and well-documented API
Established ecosystem of supported 3 rd party applications
Established ecosystem of supported 3 rd party integrations
Established presence in non-profit sector
Established extended portal

UK Tier 1 Support customer support is available
Accessible via mobile solution
New objects and fields can be added and edited by end users with clicks and not code
Advanced processes & automation can be added and edited by end users with clicks & not code
CRM layout can be edited by end users with clicks and not code
Can support complex roles and permissions

A full specification and list of system requirements are provided as Appendix A in this Tender.

About Independent Age

Our 2015-20 strategy set a clear ambition for Independent Age: ‘To very significantly increase our reach and impact over the next five years, making a measurable difference to older people’s lives.’ We agreed to prioritise support for older people who are socially isolated, as well as those who are on a low income or have poor health and mobility. The 2020-25 strategy is still emerging with health and care, financial security and building social connections within communities all expected to be an important focus, along with a greater focus on delivering local face to face services. The intention in the long term is to develop a suite of local services that work across the spectrum from preventative support to chronic need; from low to high levels of isolation and loneliness.

Our Reconnections is a new service to identify isolated older people who would benefit from short term support to help them reconnect with their communities, co-producing a re-engagement plan and then supporting them with a volunteer to re-connect with community based social activities and clubs in the community. At the end of this it is expected that they would have experienced a significant and sustainable reduction in loneliness and social isolation.

We provide older people, their families and carers with clear, free and impartial advice on issues that matter: health and care, money and benefits, social health and wellbeing. We also provide wellbeing friendship services which help build social connections and reduce loneliness – an area in which we are now developing new services and thinking; and based on the evidence of our frontline services and research with older people we campaign on the issues that matter to them.

This befriending support to older people, is often for those most chronically lonely or housebound via face to face, telephone or group chat friendship support. Delivered by matched volunteers the service provides friendship support, and meaningful relationships, which can lead to increased confidence and resilience and more independence, or simply a joyful and reciprocal friendship.

Independent Age believes however, that different levels of need require different types of intervention. For more information, visit our website www.independentage.org

1.2 Scoping Activity Undertaken To Date

Independent Age has worked with an external agency to engage staff and volunteers during its requirement gathering. This process followed included:

- ❖ Gathering all known required improvements to processes and systems, collating detail regarding existing systems, reporting and data protection. This included survey summary data related to service users and volunteers.
- ❖ Facilitated 12 workshops with Independent Age staff and partners to validate and expand on requirements, discuss possibilities and learn more about plans and ambitions for the future.
- ❖ Circulating initial documented to internal stakeholders who validated and expanded on requirements.
- ❖ Facilitated 6 workshops with volunteers across IA delivery teams to reflect on their early volunteer experiences, their experiences collaborating with IA staff to deliver services, and general communications. We also discussed ways to alleviate key pain points of the volunteer experience.
- ❖ A survey undertaken on technology and processes sent to circa 1,500 volunteers. The external agency then analysed the 359 survey responses and created a summary report with volunteer personas.

- ❖ A clickable wireframe prototype was created for key volunteer experiences – registration, onboarding, application updates and collaborating for service delivery – and validated with IA volunteers and staff.
- ❖ A draft functional specification to staff who validated and expanded on requirements.

We then reviewed all requirements and created a comprehensive, prioritised final functional specification. Our expectation is that the phasing for the work will follow the timescale below:

Phase	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10
System procurement, data migration and integrations										
Initial training and initial technical specification										
Community design and final technical specification										
Initial CRM go live, iterative deployment for existing volunteers, and training										
Community resources and resources, and training										
Secondary CRM go live, deployment for volunteer application and onboarding, and training										

1.3 Scope of supply

The contract will include the following work:

- a. Development work necessary to immerse and fully understanding Independent Age’s CRM requirements this work will build on our user specification
- b. Identification and design of new CRM functions to suit Independent Age needs
- c. Mapping of data fields for migration and ensure its effective migration
- d. Carrying out final testing and bug fixing
- e. Carrying out training with relevant Independent Age staff to ensure a competent understanding of the new CRM system
- f. Launching the final CRM system following a Test, Learn, Adapt process
- g. Working constructively with other suppliers to ensure successful integration.

- h. Ensure effective transition between currently deployed systems to the new one
- i. Purchasing of software and licenses and negotiation on our behalf
- j. Identifying opportunities for IA to be self-supporting where possible or ongoing support costs and terms to assist in cost modelling where necessary

We will be looking to maintain a strong relationship with the final chosen supplier, so that we can monitor the success of the CRM, and ensure the new system grows and adapts with the needs of our organisation. This work will be expected to include a very strong stakeholder engagement process based on a Test. Learn, Adapt approach.

1.4 Value of Contract

We would expect there to be a range of submissions and not to exceed £110,000 inclusive of VAT.

1.5 Project location

Delivery will initially be within Independent Age’s London offices in West Kensington. This location is not flexible, although it is also an essential requirement for remote access to the CRM for people working remotely or travelling (either using a tablet, and a mobile device).

The supplier will be required to attend initial planning meetings in London, as well as project development workshops as required.

We will be requesting shortlisted tenderers to present to the CRM project’s Selection Panel on 2 April 2019.

1.6 Tender process and timetable

1.	Request for tender documents issued	08 March 2019
2.	Opportunity for discussion with Project Lead	14 March 2019
3.	Deadline for initial questions 12.30pm	15 March 2019
4.	FAQs document returned to all potential suppliers	18 March 2019
5.	Meet the buyer event	20 March 2019
6.	Tenders returned to Independent Age – the tenderer will supply a compliant tender including a quote, with a breakdown of components for the entire scope of supply. This will indicate likely ongoing licence costs as a separate item within the quote	22 March 2019
7.	Shortlisted tenderers notified – up to three preferred tenderers will be selected on the basis of the tender assessment criteria. A development brief will also be provided.	25 March 2019
8.	Development Exercise: A brief will be provided to each of the three shortlisted organisations who will be asked to undertake a development process with Independent Age staff.	28 & 29 March 2019
9.	Shortlisted tenderers invited to present at Independent Age’s London Office.	2 April 2019
10.	Notification of successful tenderer	5 April 2019
11.	Contract negotiation and signing	19 April 2019

Independent Age reserves the right to change its decision of successful tenderer if the negotiation/finalisation of contract is unduly prolonged. Independent Age reserves the right to discontinue the tender process at any time prior to contract signing.

1.7 Tender assessment criteria

Compliant tenders will be assessed on the basis of the information provided by the tenderer, placing emphasis on the following criteria:

- Overall proposal suitability: Proposed solution(s) must meet the overall strategy, aims and requirements included in this document and be presented in a clear and organised manner
- Organisational Experience: Bidders will be evaluated on their experience as it pertains to the scope of this project
- Organisational Approach: Bidders will be evaluated on their overall approach and its match to the expectations included in this document
- Previous work: Bidders will be evaluated on examples of their work pertaining to CRM design and implementation as well as client testimonials and references
- Value and cost: Bidders will be evaluated on the cost of their solution(s) based on the work to be performed in accordance with the scope of this project
- Technical expertise and experience: Bidders must provide descriptions and documentation of staff technical expertise and experience

1.8 Tender conditions

The tenderer agrees to comply with the following tender conditions:

- 1 The tenderer must notify in writing if any of the submitted tender information changes or if the tenderer becomes aware that information provided to Independent Age is inaccurate, incomplete or misleading.
- 2 The tenderer must not hold itself out as an agent of Independent Age or make any representations that would lead people to believe that Independent Age guarantees the products and/or services offered by the tenderer.
- 3 If any claim is brought by any third party against Independent Age and the claim is caused by any act or activities of the tenderer (or its subcontractors) under or in connection with the service/goods delivery or any other act, omission, misrepresentation or negligence on the part of the tenderer (or its subcontractors), then the tenderer must indemnify Independent Age from and against all costs, expenses (including, but not limited to, legal and other professional fees and expenses) losses, damages and other liabilities (of whatever nature, contractual or otherwise) suffered or incurred by Independent Age.
- 4 The tenderer must gain Independent Age's prior written agreement to any publicity in connection with this contract. All details of the tender and any supporting documentation provided must otherwise be treated as strictly confidential.
- 5 The tenderer agrees not to share any details contained within this Request for Tender, or related meetings and conversations, with any third parties unless previously agreed with Independent Age and only strictly where it is necessary within the context of completing and returning the tender documents, compiling any proposals or presentations or preparing any quotes.

By signing below the tenderer agrees to be bound by the Tender (including maintaining confidentiality and non-disclosure of any information provided to the Tenderer by Independent Age) and confirms that the information set out in its submitted tender documentation document is true and accurate in all respects:

.....

for and on behalf of [*insert tenderer name*]

Name:

Position:

Date:

Section 2. Content

2.1 Tender information requirements

a. **Outline your understanding of this work by stating your vision and approach to delivering our requirements within this project, and how you believe MS Dynamics or Salesforce can support and enhance Independent Age’s Services and Volunteer Management. We would expect your response to also explain and provide details of how the CRM solution will be able to add value to Independent Age’s service development requirements**

Your response...

b. **Please share a description of a project you have worked on with similar specifications, if you have case studies to accompany then please include them with your returned tender. We would expect you to demonstrate an excellent understanding of the likely challenges, and how to mitigate them**

Your response...

c. **Please outline your experience of successfully working with third sector organisations demonstrating your approaches to significant stakeholder engagement in design that has provided long term technical support alongside the ability to build the expertise of in-house staff.**

Your response...

d. **Please give an overview of the number of people that will be working on this project, and how their skills, experience and personalities will help to make this project a success. We would expect you to demonstrate that this team has strong interpersonal, problem solving and project management skills.**

Your response...

- e. **Please give details of the support services that you offer beyond the delivery of a CRM, and the relationship you have with ongoing clients.**

Your response...

- f. **Please demonstrate that you have proven record of both establishing stand-alone CRM solutions as well as considerable experience of integration of the proposed CRM solution with different 3rd party systems. This integration piece is a key requirement in our user specification. We would expect you to indicate an excellent understanding of the likely challenges, and how to mitigate them**

Your response...

g. Indicate your understanding of the practicalities of implementing a CRM system, linking this to the necessary budget and timescales to do so.

Your response...

h. Please outline the steps your company has a comprehensive understanding of GDPR in order to address changes to regulation and data protection – particularly with regards to communications consents – within the suggested CRM platform you will using with us.

Your response...

2.2 CRM Requirements

We have compiled an extensive list of basic and essential requirements for any new CRM system (included in this pack as appendix A), as well as your answers to the questions in other sections, please can you indicate that the CRM solution is able to meet these requirements – with any additional information around each that you think might be necessary or useful at the tender stage.

Your response...

2.3 Local knowledge and impact

The Wellbeing environment in the UK can be very complex and we will be expecting all shortlisted tenderers to have a full understanding of the current Wellbeing market place and the various

Your response...

different elements of Wellbeing (including, but not limited to long term befriending, short term service interventions, on boarding and supporting volunteers). Crucially all shortlisted tenderers must also be able to demonstrate an understanding of service development opportunities.

2.4 Company Information

a. Address Details:

Company name:			
Address:			
Town:		Postcode:	
Registered Office (if different from above):			
Phone:		Website:	
Person to contact regarding this tender:			
Position:			
Direct line:		Mobile:	
E-mail:			

b. Company Details:

Legal status (e. g. Sole Trader, Partnership, Private Limited Company, Public Limited Company or other):			
Registered company number			
Details of any outstanding claims or litigation against the Company:			
VAT registration number:		Date established or registered:	
Name of Parent Company or details of Group Structure Include details of other organisations when bid is on behalf of a group of organisations:			
Relevant accreditations held:			

Number of Staff:	

c. Technical scope

How long has your organisation been delivering this service/good?	
What is your specialist area and what are the other services you provide?	
Can you provide one or more case studies as a demonstration of your previous experience?	YES, documents enclosed <input type="checkbox"/> NO <input type="checkbox"/>

2.5 Check list of documents to include in the tender

Please provide the following documents in addition to your quote/completed questionnaire and the signed declaration on page 6:

- A detailed quote with a breakdown of the cost of components
- Indication of ongoing support, hosting arrangements and licence costs
- 3-4 Case Studies, detailing similar projects undertaken
- Contact details for two past clients. *Referees' personal details will be kept strictly confidential and used only for the sole purpose of gaining an insight into the work of your company. We will make every effort to ensure that we do not inconvenience them. Referees must be past clients, and must not be in any way related to the tenderer's company or any of its employees.*
- Any relevant certification (or equivalent) documents
- Your company's contractual terms and conditions, including payment terms and details of any warranties

PLEASE REMEMBER TO COMPLETE AND SIGN THE DECLARATION ON PAGE 6 AND INCLUDE THIS WITH YOUR RETURNED TENDER DOCUMENTATION. SUBMITTED SIGNATURES MUST BE ORIGINALS IN HARD COPY.