Corporate Procurement
SOFT MARKET TESTING (SMT):
ASSESSING MARKET INTEREST IN THE IMPLEMENTATION OF A
Customer Relationship Management system

RETURN OF SMT submissions

The closing date for the return of SMT submissions is 12 noon on: **15 JAN 2016**

http://www.the-chest.org.uk

CONTACT AND QUERIES

Please raise any queries which may have a bearing on the SMT or any specific questions regarding this process with Wirral Council Corporate Procurement **via The Chest** at the earliest opportunity, and in any case **not later than 12 noon, 3 working days prior to the closing date**. Questions raised after this time may not be responded to.

Interested parties are advised that where such enquiries have been made, and it is appropriate to do so, the Council will distribute a copy of the enquiry and the written reply, with anonymity preserved, via The Chest.

PLEASE DO NOT CONTACT OFFICERS VIA ANY OTHER METHOD AS A RESPONSE WILL NOT BE PROVIDED.

Please indicate those parts of your submission that you regard as commercially sensitive in the event that information requests are received from third parties.

USING THE CHEST

Supplier Guides on how to use The Chest can be found by clicking on the "Help" button at the top right hand side of the screen.

In the event of any TECHNICAL problems using The Chest, please contact:

nwsupport@due-north.com

Telephone: 0845 293 0459   (08:30 - 17:30)

Section 1 – Scope

1.1 Scope

This contract is primarily for delivery of goods or services to council establishments in Wirral.   Wirral is a Metropolitan Borough of Merseyside in the North West of England with a population of approx 300,000 over 60 square miles. Further information about Wirral is available on our website (www.wirral.gov.uk).

As part of this SMT exercise Wirral Council is inviting submissions to assess the market in support of a potential procurement for a Customer Relationship Management (CRM) system or similar solution offering CRM functionality.

1. *This is not a Pre-Qualification Questionnaire (PQQ), and your responses will be considered by officers to help to determine how the council wishes to proceed with the initiative to create a CRM in support of the Council's Digital First strategy/2020 Vision (see appendix).*

2. *This exercise is intended to assess the level of interest from potential suppliers; and to solicit innovative ideas about options for the enhancement of the Council's customer, staff and partner interfaces to meet future business needs, realise its strategic objectives, and deliver improved functionality for the benefit of all users and the wider organisation. By issuing notices and publishing this document the council is not committing to progressing further.*

3. *References to the form of agreement are for information and context only and may change.*

4. *Your responses will not be "evaluated" and scored, as this exercise is distinct to any future procurement process. Any indication of commercial terms will not be binding on you, and will not be considered if the council proceeds further.*

5. *The council accepts no responsibility for any associated financial costs, nor will it be liable for reimbursement of any costs related to this submission.*

6. *The council is open to exploring innovative ways of structuring any prospective implementation that delivers the required benefits. Please do not feel constrained from making alternative proposals or suggesting different approaches that meet business requirements.*

7. *The scope of this SMT Questionnaire is for the Council to gain an understanding of what potential solutions are available to inform its development plan and any related procurement exercise to maximise the value realised by the Council – additional, innovative ideas or solutions would be welcome in addition to a compliant response.*

8. *The questions included in this SMT Questionnaire are informed by the Council's Digital First strategy and an internal review of current capabilities to meet these strategic objectives.*

The council has the following Vision Statement for its Customer Access Strategy, in support of the [Wirral Plan: a 2020 Vision](#)

Our customer services will enable Wirral residents and businesses to make informed choices. We will provide reliable, consistent and cost effective services to our customers; promoting self-sufficiency so that our resources can be focused on supporting the most vulnerable. The services provided to our staff will be guided by the same principles, promoting self-service and self-sufficiency, so that our expertise can be focused on supporting staff with more complex issues. This vision has led to the following design principles:

- *Our online services will be easy to find and use, effective, efficient and secure, and become the channel of choice for most of our customers*

- *Wirral residents, partners and staff will have the necessary access, skills confidence and support to enable them to interact with the council online*

- *Face to face services will be available at accessible neighbourhood hubs*

- *Enquiries will be resolved at the point of contact wherever possible*

- *Our services and processes will be clear and transparent*

- *We will have a 'single view of the customer' across disparate services to provide insight and enable informed decision-making about future service provision focused on customer requirements*

- *We will share information across the Wirral partnership wherever possible to avoid duplication and provide a joined up customer experience*

- *Wherever possible online service provision will be fully integrated into 'back office' systems providing a seamless customer experience and avoiding costly duplication/manual processes in the 'back office'*

- *That our services and communications will be easy to understand*

In order to meet this vision the council is currently reviewing its existing customer/staff/partner interfaces and drafting a scope for a new corporate CRM which will meet these future business requirements.

1.2   Wirral Council Strategic Review

Wirral Council is currently undergoing a strategic review and due to the uncertainty of services required in the future, there is no guarantee as to the level of business. Please note that should the strategic review deem that this service is no longer required or the service is not to be provided by Wirral Council, then Wirral Council reserve the right to terminate this contract.

1.3   Contract Duration

This is a soft market testing exercise. Contract information will be provided in any future procurement document.

Section 2 – Specification

2.1 Specification

The specification of a corporate CRM or alternative solution providing similar functionality is informed by the Customer Access Strategy vision/design principles as described in Scope (point 1.1); Appendix and specified below:

The council's CRM/similar solution will facilitate customer interactions including:

- Integration to 'back office' legacy applications

- Transactional functionality e.g. scheduling; mapping; payments etc.

- Service request progress tracking

Authenticated access via a single sign-on account to enable:

- Authenticated integration to 'back office' legacy applications

- Single sign-on account

- 'Tell us once' personal information updates

- Personalised customer information provision

- Booking/scheduling functionality

- Auto-fill form completion

- Document management

- Simple workflow

- Customer engagement and provision for feedback

Accessed via following media/channels:

- Self-service

- Mediated service e.g. via Call Centre; Council 'One Stop Shop'

- Partner service e.g. public sector partners across the 'Wirral Partnership'

- Community service e.g. access by community/other single-interest groups

Providing the following functionality for the Council:

- 'single view of the customer' across multiple services

- Channel; service; transaction; customer analytics/reporting tools enabling provision of customer insight

Section 3 – Questions

(max. 500 words per response (expand fields as appropriate) though supporting documentation will be accepted).

No	Description
1	**Does your organisation (and/or partners) have experience of recently implementing a CRM or similar solution to another unitary council? (Please provide case study evidence)**
2	**a. What were the proven (tangible/non-tangible) benefits identified from this recent implementation?** **b. Are you happy for Wirral Council representatives to contact the case study customer(s) for independent verification?**
3	**Please describe/be prepared to demonstrate how your solution(s) provides the following:** **a. Customer information provision** **b. Integration to 'back office' legacy applications** **c. Transactional functionality** **d. Service request progress tracking** **e. Scheduling functionality** **f. Mapping functionality e.g. locational issue reporting** **g. Secure payments**
4	**Please describe/be prepared to demonstrate how your solution(s) supports (authenticated) access across a seamless, intuitive interface to:** **a. Authenticated integration to 'back office' legacy applications** **b. Single sign-on account** **c. 'Tell us once' personal information updates**

	d. **Personalised customer information provision** e. **Booking/scheduling functionality** f. **Auto-fill form completion** g. **Secure payments** h. **Document management** i. **Simple workflow** j. **Customer engagement and feedback**
5	**Please describe/be prepared to demonstrate how your solution(s) supports access across a seamless, intuitive interface via the following channels:** a. **Self-service** b. **Mediated service e.g. via Call Centre; Council 'One Stop Shop'** c. **Partner service e.g. other public/voluntary sector partner across the 'Wirral Partnership'** d. **Community service e.g. provision for access by community or other single-interest groups**
6	**Please describe/be prepared to demonstrate how your solution(s) supports the generation of customer insight:** a. **'Single view of the customer' across disparate services i.e. creation and maintenance of single customer record to enable functionality described in question 4** b. **Reporting/analytics tools enabling generation of customer insight**
7	**Please provide evidence of which third-party applications your solution(s) have successfully integrated with to enable functionality described in questions 3 and 4.**

8	**Please describe/be prepared to demonstrate how your solution(s) support the provision of comprehensive management information e.g. measurement of Key Performance Indicators.**
9	**Please describe any other benefits/functionality that your solution(s) may offer the Council that are not described above.**
10	**Is your solution(s) configurable after initial implementation - can you describe your standard process for scoping/testing/implementing and on-going support (including indicative timescales)?** **Does the implementation include an element of skills transfer to enable future configuration by the council?**
11	**Are you able to provide any indicative costings for implementation of your solution e.g. scalable module/licence/configuration/integration costs?**
12	**It may be a requirement to make a presentation, should the Authority so wish – please confirm you are able to provide a demonstration if requested.** **If you require any further clarification from the Council please use the contact details provided below.**

Section 5 – Contact details

COMPANY NAME	
COMPANY REGISTERED ADDRESS (including postcode)	
CONTACT NAME	
POSITION	
TELEPHONE	
EMAIL	