Engagement (Business to business) CRM (ITS1057 AP)

SUMMARY

Start date: 1st August, 2023

End date: 31st July, 2025

OJEU Number: OJEU/FTS (2022/S 223-642960)

Lead Consortium: APUC

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Website:
https://www.hecontracts.co.uk/agreements/1123

SCOPE

The purpose of this procurement exercise is to appoint a range of capable best value Contractors for the supply of Engagement (Business to Business) CRM Systems and Associated Services.The scope of this procurement includes but not limited to provision of:

1. Timely installation of all required software functionality and upgrades.
2. All associated software licensing and or equivalent model of service delivery.
3. Support and Maintenance in line with contractual Service Level obligations.
4. Managed Hosting Infrastructure, as required by Institutions, scalable to deliver all Service Level obligations.
5. Solution Implementation including Data Migration as required by Institutions.
6. Project Management of all required Solution Implementations and upgrades as required by Institutions.
7. High performance Integration with a range of corporate and specialist education sector Systems.
8. Access to relevant institutional data for business intelligence purposes
9. Solution Consultancy wherever required.

AGREEMENT BENEFITS

General key benefits that the Institutions aspire to include:

- Improved student/client end-to-end experience from enquiries to departure which meets digital expectations including anywhere anytime access from mobile devices.
- Improved staff experience, including back-office staff new starts that need to be swiftly up to speed with the administration of the Engagement Customer Relationship Management System.
- Operational and cost efficiencies including reduction in multiple systems and local data sets, eliminating rekeying.
- Clear data identification streamlined data flow and improved business intelligence.
- Increased capacity and capability to manage data, quality, ownership and stewardship.
- Reduce the risk associated with interfacing systems by incorporating these into core functionality.
- GDPR is applicable to this Framework Agreement and has been asessment
- Contractors undertook a cyber security asessment at the time of tender
- A selection of high-quality Suppliers of Engagement CRM Systems and Associated Services Reduction in administrative costs and efforts.
- Ceiling rates/maximum pricing defined and agreed for the duration of the Framework Agreement. This pricing can be reduced further at time of mini competition or through using the Desktop Calculator.
- The ability for Institutions to utilise the framework agreement for renewals and reviews of the market, including a capable mix of Contractors
- A compliant Framework Agreement with robust Terms and Conditions (to be finalised)
- Flexible Call-Off mechanisms that will allow institutions to renew contracts or to assist with competitions for system migrations.
- Direct Call-Off option available which provides institutions with an easy to use and compliant route to market.
- Option of a desktop calculator to allow institutions review and adjust the award criteria weightings in line with the Institution's requirement.
- Contract management and monitoring of the agreement using a rigorous set of Key Performance Indicators (KPIs).
- All suppliers have undertaken a Cyber Assurance assessment using the Scottish Governments tool CSPST.
- Section A: Background - Cyber Security Procurement Support Tool: guidance for buyers - gov.scot (www.gov.scot)

- Effective reporting mechanism to obtain accurate, timely and relevant management information.
- Shared risk and management of Contractors with APUC.
- Accessibility to institutions throughout the UK with the inclusion of additional consortia
- Responsible procurement activity is embedded.
- BT1, BT2 and BT14 savings information.

USING THE FRAMEWORK

SUPPLIERS

Tribal Education Limited,

SUSTAINABILITY

The suppliers were asked to provided an overview of their net zero steps, hosting practices and community benefits available.

NEXT STEPS