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Planning

Proprietary Customer Relationship Management (CRM) System

The Royal Borough of Windsor and Maidenhead Council

F01: Prior information notice

Prior information only

Notice identifier: 2023/S 000-003294

Procurement identifier (OCID): ocds-h6vhtk-03a26e

Published 2 February 2023, 3:01pm

Section I: Contracting authority

I.1) Name and addresses

The Royal Borough of Windsor and Maidenhead Council

Town Hall, St Ives Road

MAIDENHEAD

SL61RF

Email

procurement@rbwm.gov.uk

Country

United Kingdom

Region code

UKJ11 - Berkshire

Justification for not providing organisation identifier

Not on any register

Internet address(es)

Main address

<https://www.rbwm.gov.uk/>

Buyer's address

<https://public.bravosolution.co.uk/web/login.html>

I.3) Communication

Additional information can be obtained from the above-mentioned address

I.4) Type of the contracting authority

Regional or local authority

I.5) Main activity

General public services

Section II: Object**II.1) Scope of the procurement****II.1.1) Title**

Proprietary Customer Relationship Management (CRM) System

II.1.2) Main CPV code

- 48445000 - Customer Relation Management software package

II.1.3) Type of contract

Supplies

II.1.4) Short description

The Royal Borough of Windsor & Maidenhead (RBWM) is inviting expressions of interest from providers of proprietary (not open source) Customer Relationship Management (CRM) systems. If your organisation provides such systems and is interested in supplying such a system to RBWM then please contact procurement@rbwm.gov.uk expressing your interest. RBWM will then ask you to complete a Market Questionnaire so that it can better understand your potential offering.

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 48333000 - Contact management software package
- 48510000 - Communication software package

II.2.3) Place of performance

NUTS codes

- UKJ11 - Berkshire

Main site or place of performance

The Royal Borough of Windsor & Maidenhead

II.2.4) Description of the procurement

Per the information given at II.1.4 of this notice please contact procurement@rbwm.gov.uk if you are interested in this potential opportunity.

Your proprietary Customer Relationship Management (CRM) System will need to meet the following high level requirements -

- The CRM is to be public or private cloud hosted by the Provider and must be hosted in a UK based data centre that meets ISO 27001 standards;
- The CRM must be compatible and fully integrated with Brightly (Confirm), IDOX (Uniform), Whitespace, RBWM's address API, Adelante payments and Office 365 calendars for bookings;
- It is desirable for the CRM to be integrated with RBWM's Active Directory so that staff

can sign in using their RBWM username and password;

- The CRM must be open API;
- The CRM should be low / no code with regards to RBWM ability to create new processes / workflows and forms within the system;
- The CRM must be cross internet browser compatible;
- The CRM must be cross device compatible, for example PC, tablet, mobile phone, etc;
- The Authority will require ongoing updates, upgrades and patches with regards to security and improvements to the CRM;
- The CRM should come with Two Factor Authentication with regards to logging into the CRM;
- The CRM (and where applicable its software) must meet the following standards for hosting -
 - ISO/IEC 27001 Information Security Standard
 - Web Content Accessibility Guidelines (WCAG) 2.1 to a standard of 'AA' or higher
 - BS 8878:2010 Web Accessibility Code of Practice to ensure compliance with the Disability Discrimination Act (DDA) 1995, The Equality Act 2010, the Data Protection Act 2018 and The General Data Protection Regulations
 - TLS encryption 1.2 or higher for all data.
- The CRM must be available to use online and must be able to send automated and or manual emails to other users such as RBWM residents;
- It is desirable for the CRM to be able to send SMS messages;
- The CRM must operate customer accounts (such as for RBWM residents) and that when signed up to include marketing preferences so that residents / customers can opt in and out of email newsletters and alerts where required;
- The CRM must come with a separate test environment;
- The Provider must keep a backup of the live environment such as in case of system or other failure;

- RBWM must be able to create its own workflows and forms within the CRM;
- The CRM must come with reporting tools / functionality which enables RBWM to report on all case data and be able to export form data;
- The CRM, it's workflows, forms, URLs and 'from' email address must reflect RBWM branding;
- At present 4 members of RBWM staff will need access to the CRM as Super Users / Administrators;
- At present an additional 340 members of RBWM and partner organisation staff will need access to the CRM mostly with view only access;
- At present at least 60,000 residents will require access to the CRM such as via customer accounts;
- The Authority may require the Provider to re-create / build up to 287 webforms and 31 case workflows in its CRM solution on RBWM's behalf; and
- The Authority may require the Provider to import 52,171 existing resident / customer accounts and 15,900 existing cases (15,000 green waste subscriptions, 300 education appeals and 600 complaints) into its CRM on RBWM's behalf.

II.3) Estimated date of publication of contract notice

3 April 2023

Section IV. Procedure

IV.1) Description

IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes