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Planning

## YPO 001253 - Single CRM Solution

Yorkshire Purchasing Organisation

UK2: Preliminary market engagement notice - Procurement Act 2023 - [view information about notice types](#)

Notice identifier: 2025/S 000-009400

Procurement identifier (OCID): ocds-h6vhtk-04ed37 ([view related notices](#))

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### Scope

### Reference

001253

### Description

YPO wishes to procure single CRM solution in 2025 and start the tender process within the next 2-3 months.

Background information: Customer Relationship Management System (CRM), will enable YPO to perform various business functions, manage flow of information and automate tasks using technologies that are currently available and those which evolve throughout the lifetime of the tender. YPO currently operate three different CRM systems, the aim is to bring three existing separate CRMs together into one system, to provide enhanced functionality for use by various teams across YPO.

These teams include:

- Sales
- Procurement Teams
- Customer Service
- Marketing
- Finance
- Business Intelligence & Data

Core functionalities include;

- Ability to handle 200,000+ customer accounts and records across various customer types
- Heavy workload usage of 150+ concurrent users without compromising system performance
- Account creation and management
- Sales data including leads, opportunity and pipeline management
- Creation and workflow management of tasks including, complaints, calls, activities, and varying other opportunities
- Marketing segmentation and reporting
- Marketing campaign tracking against sales data
- System integration

### **Total value (estimated)**

- £4,000,000 excluding VAT
- £4,800,000 including VAT

Above the relevant threshold

### **Contract dates (estimated)**

- 1 December 2025 to 31 December 2035
- 10 years, 1 month

### **Main procurement category**

Services

### **CPV classifications**

- 48000000 - Software package and information systems
- 72000000 - IT services: consulting, software development, Internet and support

### **Contract locations**

- UKE45 - Wakefield

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## **Engagement**

### **Engagement deadline**

30 April 2025

### **Engagement process description**

Therefore, YPO would like to invite all interested providers to Supplier Webinar, which will take place on 14th April 2025 at 14:00 to provide pre-tender information on the bidding process and high-level requirements. The webinar's aim is to give all suppliers an opportunity to ask tender and requirement related questions in an open forum and to familiarise themselves with the competitive flexible procedure which will be used to carry out this procurement exercise.

To register your interest in the webinar please contact Adam Greatwood at [adam.greatwood@ypo.co.uk](mailto:adam.greatwood@ypo.co.uk) before 7th April 2025. Please note YPO reserve the right to cancel the webinar if insufficient interest is received.

YPO reserves the right to not commit to advertising this tender if we do so wish. Should YPO wish to proceed further a formal procurement process will be followed in accordance with YPO's contract procedure rules and in line with the Procurement Act 2023 as relevant. Please note that any information is being sought without prejudice and without commitment.

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## **Contracting authority**

### **Yorkshire Purchasing Organisation**

- Public Procurement Organisation Number: PMRV-4748-MNJV

41 Industrial Park

Wakefield

WF2 0XE

United Kingdom

Contact name: Adam Greatwood

Email: [adam.greatwood@ypo.co.uk](mailto:adam.greatwood@ypo.co.uk)

Region: UKE45 - Wakefield

Organisation type: Public authority - sub-central government