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Tender

## **The Provision of a CRM and MDM Solution**

Buckinghamshire Council

F02: Contract notice

Notice identifier: 2022/S 000-023138

Procurement identifier (OCID): ocids-h6vhtk-03605f

Published 19 August 2022, 1:57pm

### **Section I: Contracting authority**

#### **I.1) Name and addresses**

Buckinghamshire Council

Walton Street Offices

Aylesbury

HP20 1UA

#### **Contact**

Miss Helen Bold

#### **Email**

[helen.bold@buckinghamshire.gov.uk](mailto:helen.bold@buckinghamshire.gov.uk)

#### **Telephone**

+44 1296383660

#### **Country**

United Kingdom

**Region code**

UKJ13 - Buckinghamshire CC

**Internet address(es)**

Main address

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

Buyer's address

<https://www.supplybucksbusiness.org.uk>

**I.3) Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at

[www.supplybucksbusiness.org.uk](http://www.supplybucksbusiness.org.uk)

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

[www.supplybucksbusiness.org.uk](http://www.supplybucksbusiness.org.uk)

**I.4) Type of the contracting authority**

Regional or local authority

**I.5) Main activity**

General public services

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**Section II: Object**

**II.1) Scope of the procurement**

**II.1.1) Title**

## The Provision of a CRM and MDM Solution

Reference number

DN619010

### **II.1.2) Main CPV code**

- 48000000 - Software package and information systems

### **II.1.3) Type of contract**

Supplies

### **II.1.4) Short description**

The Buckinghamshire Council seeks tenders from suitably qualified and experienced organisations for the provision of a corporate, modern Customer Relationship Platform (CRM) that supports the Council's vision of a "Customer First" culture. Our vision is to give residents more free time by making everything they do with the Council faster and easier. We need modern tools to achieve this, harnessing the power of Master Data Management (MDM) to enable a 'single view of the customer' and integrate with existing Line of Business systems. This cloud hosted system will provide rich, unfettered data to help promote the seamless digital journey from the Buckinghamshire Council website.

The solution will include (but not be limited to) the following: hosting, licensing, maintenance, upgrades, reporting, consultancy, customisation, configuration, database administration, data cleansing, data migration, Implementation, initial training, ongoing support.

### **II.1.6) Information about lots**

This contract is divided into lots: No

## **II.2) Description**

### **II.2.2) Additional CPV code(s)**

- 48445000 - Customer Relation Management software package
- 72000000 - IT services: consulting, software development, Internet and support
- 72212445 - Customer Relation Management software development services

### **II.2.3) Place of performance**

NUTS codes

- UKJ13 - Buckinghamshire CC

Main site or place of performance

Buckinghamshire

#### **II.2.4) Description of the procurement**

The Buckinghamshire Council seeks tenders from suitably qualified and experienced organisations for the provision of a corporate, modern Customer Relationship Platform (CRM) that supports the Council's vision of a "Customer First" culture. Our vision is to give residents more free time by making everything they do with the Council faster and easier. We need modern tools to achieve this, harnessing the power of Master Data Management (MDM) to enable a 'single view of the customer' and integrate with existing Line of Business systems. This cloud hosted system will provide rich, unfettered data to help promote the seamless digital journey from the Buckinghamshire Council website.

The solution will include (but not be limited to) the following: hosting, licensing, maintenance, upgrades, reporting, consultancy, customisation, configuration, database administration, data cleansing, data migration, Implementation, initial training, ongoing support.

We are seeking a collaborative supplier to support our talented Council officers to get the best use and value from the platform assets.

The CRM platform needs to be effective and configurable, fulfilling our high-level requirements of interactive web forms, a customer account, and an integration engine to fulfil integration into our back-office systems. The platform will enable analysis of customer needs so we can shape our services accordingly as we achieve a better understanding of how customers interact across all services. A CRM platform combined with MDM technology will enable residents to track service requests, receive updates electronically, so we can deliver personalised, targeted services and communication to strengthen relationships with our communities.

Our vision is for a platform that touches all service areas, with an emphasis on providing integrations for the more transactional services. We intend to do this through a four-phase programme, as described in the requirements.

The platform will enable future integration and interaction around online booking, payments, live chat, social listening, artificial intelligence, data management, Single Sign On, and several other capabilities. It is important we see no degradation to our existing services, particularly Household Waste with established integrations. This also includes a

single sign on into some of our applications, including (but not limited to) our Revenues and Benefits application and our library services application.

The successful supplier will have a track record of delivery of this type of platform and must be able to demonstrate that their platform is currently operational.

The programme to implement this new instance of a CRM platform with MDM capability has five phases, which are as follows:

Phase 0: the build of the core components of the platform – the CRM, case management, interactive web forms, the customer account, the integration engine, and the MDM capabilities. This phase is estimated to begin in January 2023, with a go-live date of July 2023

Phase 1: discovery, design and deployment of the following service areas, including the necessary interactive web forms, case management, and integrations into back-office systems – household waste; revenues and benefits; financial support for our communities; Transport for Bucks; Family Information Service; Client Transport. This phase is estimated to begin in January 2023, with a go-live date of July 2023

Phase 2: discovery, design and deployment of the following service areas, including the necessary interactive web forms, case management, and integrations into back-office systems – registrars; business development; finance; housing; environmental health; land charges; planning; building control; licensing. This phase is estimated to begin May 2023, with a go-live date of November 2023

Phase 3: discovery, design and deployment of the following service areas, including the necessary interactive web forms, case management, and integrations into back-office systems – children's services; blue badge and bus passes; adult social care; special educational needs team; localism; adult learning; library services; education. This phase is estimated to begin in September 2023, with a go-live date of February 2024

Phase 4: discovery, design and deployment of the following service areas, including the necessary interactive web forms, case management, and integrations into back-office systems – household waste; revenues and benefits; financial support for our communities; strategic development; electoral registration; HS2 team; parking. This phase is estimated to begin in January 2024, with a go-live date of May 2024

It is important that you consider whether you can reach these timescales before a tender is submitted.

Please be aware that there are mandatory requirements and organisations will be excluded from the process if these requirements are not met.

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **II.2.6) Estimated value**

Value excluding VAT: £2,920,000

### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months

60

This contract is subject to renewal

Yes

Description of renewals

An option to extend for a period, or consecutive periods, of up to sixty (60) months.

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: Yes

Description of options

An option to extend for a period, or consecutive periods, of up to sixty (60) months.

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

### **II.2.14) Additional information**

The estimated contract value covers the 5 year initial term and the possible 60 months extension period.

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## **Section IV. Procedure**

### **IV.1) Description**

#### **IV.1.1) Type of procedure**

Open procedure

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

The procurement is covered by the Government Procurement Agreement: Yes

### **IV.2) Administrative information**

#### **IV.2.2) Time limit for receipt of tenders or requests to participate**

Date

19 September 2022

Local time

3:00pm

#### **IV.2.4) Languages in which tenders or requests to participate may be submitted**

English

#### **IV.2.6) Minimum time frame during which the tenderer must maintain the tender**

Duration in months: 3 (from the date stated for receipt of tender)

#### **IV.2.7) Conditions for opening of tenders**

Date

19 September 2022

Local time

3:30pm

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## **Section VI. Complementary information**

### **VI.1) Information about recurrence**

This is a recurrent procurement: No

### **VI.4) Procedures for review**

#### **VI.4.1) Review body**

High Courts of Justice

The Royal Court of Justice, The Strand

London

WC2A 2LL

Country

United Kingdom