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Contract

## **YWS Customer Relationship Management (Software Tool and Systems Integrator)**

YORKSHIRE WATER SERVICES LIMITED

F06: Contract award notice – utilities

Notice identifier: 2022/S 000-029478

Procurement identifier (OCID): ocds-h6vhtk-02fba2

Published 19 October 2022, 3:08pm

### **Section I: Contracting entity**

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

YORKSHIRE WATER SERVICES LIMITED

Western House, Western Way, Buttershaw

BRADFORD

BD62SZ

#### **Contact**

Dharmesh Depala

#### **Email**

[Dharmesh.Depala@yorkshirewater.co.uk](mailto:Dharmesh.Depala@yorkshirewater.co.uk)

#### **Telephone**

+44 7890034478

#### **Country**

United Kingdom

**Region code**

UKE41 - Bradford

**Companies House**

02366682

**Internet address(es)**

Main address

<https://www.yorkshirewater.com/>

**I.6) Main activity**

Water

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**Section II: Object**

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

**II.1.1) Title**

YWS Customer Relationship Management (Software Tool and Systems Integrator)

**II.1.2) Main CPV code**

- 72000000 - IT services: consulting, software development, Internet and support

**II.1.3) Type of contract**

Services

**II.1.4) Short description**

General: YWS have an ambition to excel in the experience we offer to our customers. Our CX Tech Strategy sets out a pathway by which we can accelerate elements of our CX ambition. We will be procuring a new 'Best of Suite CRM platform for digital self-service enablement across all aspects of customer journey management and the effective management of customer cases. This tender process is to select suppliers who can work with Yorkshire Water to transform our customer experience technology area through two

main services:

- Customer Relationship Management Software. Which may include provision of software, hosting, maintenance, support, training and a range of other related services.
- Customer Relationship Management Implementation which may include provision of a range of implementation, configuration, integration, testing and arrange of other services

For avoidance of doubt, bidders must be capable of delivering both the CRM Software Tool, either directly or acting as a reseller, and the Systems Integration service. YW will work with successful bidders to deliver a step change in the experience offered to YW customers. The project will deliver a best of suite CRM platform for digital self-service enablement across all aspects of customer journey management and the effective management of customer cases. The internal users of the solution will be from across Yorkshire Water (and its suppliers) including customer, developer services, operations, water/waste business areas and other related teams which are not mentioned here. YWS are proposing investment in new core CRM systems to achieve the CX ambition. The key investment areas proposed are as follows:

- Best of Suite CRM Solution: Customer identity; channel-agnostic so customers do not have to repeat themselves; workflow and correspondence
- Digital Channels: Delivering parity of capability with traditional channels, personalisation

The capabilities the solution will implement are as follows : Digital Engagement, Case Management, Knowledge Management, Automation of Engagements, Workflow and BPM Support, Real-time Continuous Intelligence, Workforce Engagement Management, Intelligent Voice System, Platform Ecosystem & Integration, Usability, Agility & COVID-19 Response. The capabilities sought from a System Integrator are: Business Acumen, Business Process Transformation, Customer Service/Support Experience, Marketing CRM Experience, Sale CRM Experience, Commerce Experience, Customer Experience Architecture, Customer Data & Analytics, Technology Architecture/Integration, Digital Design and User Experience (UX), Organisational Change Management (OCM) Systems Integrator Professional Services: Yorkshire Water require the services of an experienced CRM 'Systems Integrator' to identify an appropriate CRM solution and operate within the Customer Interactions Management programme to deliver an appropriately configured, developed, tested and implemented solution. The SI will be required to support the YW journey to defining and shaping change, implementing business process, establishing suitable User Experiences and configuring business rules an integration within Yorkshire Water's Integrated Customer and Operational Management (ICOM) process. The ICOM process will manage all available customer channels, customer interactions, case and subcase management. CRM Software Tool: The CRM Tool targeted will be the 'front door' of the ICOM process and be responsible for the effective management of all customer channels, customer interactions, case and subcase management. The CRM Tool will be targeted as Yorkshire Water's Customer 'system of record' and will manage and capture all customer interactions (inbound and outbound). YW would also be interested in exploring the option of including CCaaS within the scope of this procurement exercise as an optional or additional requirement.

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

This contract is divided into lots: No

### **II.1.7) Total value of the procurement (excluding VAT)**

Value excluding VAT: £9,021,846

## **II.2) Description**

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

NUTS codes

- UKE - Yorkshire and the Humber

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

Yorkshire Water (YW) are seeking a provider (either a customer experience systems implementer who resells CX software or a CX software provider with implementation experience) of a 'best of suite' CRM solution capable of managing all related customer interactions, cases, subcases and communications that span the Billing and Operational areas. At this stage in the process, YW want to consider the widest variety of options. Therefore, YW would discourage Tool providers partnering with a single Systems Integrator or vice versa

The successful bidder must have extensive experience of undertaking technology powered transformations of utility companies' customer experience environments.

We are seeking suppliers (inc. CRM resellers) with deep experience of supplying, configuring, implementing, and transforming customer experience using a combination of technology, processes, and other transformation tools.

The scope is as follows:

Customer relationship management platform: bidding entities will act as a software supplier themselves or as a reseller of their recommended tool(s). This element includes the provision of software, hosting, maintenance, support, training, and a range of other related services.

The selected 'best in suite' CRM solution will be the 'front door' of the customer management process and be responsible for the effective management of all customer channels, customer interactions, case, and subcase management. The CRM solution will be Yorkshire Water's Customer 'system of record' and will manage and capture all customer interactions (inbound and outbound). The system will also need to integrate with a range of other corporate systems including SAP.

The capabilities sought from the tool may include:

Digital Engagement, customer relationship management, native channels integration, Customer Interactions and Case Management, Work / Subcase Management, integration and API capability, Customer Appointment & Commitment Management, Process Automation, SLA and jeopardy Management of both case and subcase, performance reporting, management information & analytics, business rules management, configuration focused rather than development or customisation, knowledge management, automation of engagements, workflow and business process management support, real-time continuous intelligence, workforce engagement management, intelligent voice system, platform ecosystem & integration, usability, agility & COVID-19 Response, email/SMS, Webchat, Call recording, content and sentiments analytics and a range of other related capabilities, including the replacement of in-house developed systems.

Customer relationship management implementation and professional services: which may include provision of a range of services including but not limited to implementation, design, build, configuration, development, data migration, process mapping, integration, testing and a range of other services. The successful bidding entity will: recommend, implement, and configure a CRM solution with the capability to meet YW's needs. The delivery of the new solution will be within Yorkshire Water's Customer Interactions Management programme which will implement an appropriately configured and developed solution. The bidding entity will potentially be required to support YW in defining and shaping changes, implementing business process, establishing suitable User Experiences, and configuring business rules within Yorkshire Water's Integrated Customer and Operational Management (ICOM) process. The ICOM process will manage all available customer channels, customer interactions, case and subcase management. The system will be required to integrate with a range of systems including SAP and other product solutions and in-house developed systems.

Example implementation services include: Business Process Transformation, Customer Service/Support Experience, Marketing CRM Experience, Commerce Experience, Customer Experience Architecture, Customer Data & Analytics, Technology Architecture/Integration, Digital Design, User Experience (UX), supporting in Organisational Change Management (OCM), Project Management, Quality Control, Design Assurance, Systems Integration, supporting System Integration Testing, Business Continuity Planning, transition into support, provision of support, technical advice, project planning, process design, requirements analysis, solution architecture, solution design, service design, security and a variety of other capabilities required by YW from time to time.

This process is to select one bidding entity who will provide both the required technical solutions (themselves or as a reseller) and the implementation services required to implement them.

## Procurement Process:

To express an interest in participating in the tender, please contact Dharmesh Depala ([Dharmesh.depala@yorkshirewater.co.uk](mailto:Dharmesh.depala@yorkshirewater.co.uk)) through email by 17:00 (GMT) on 20th December 2021.

Once a bidder expresses an interest, the Invitation to Qualify (ITQ) document pack will be shared with them. This will include the ITQ questionnaire that must be completed by all bidders and returned to the above email address by 17:00 (GMT) on 6th January 2022.

All clarifications should also be shared with Dharmesh Depala ([Dharmesh.depala@yorkshirewater.co.uk](mailto:Dharmesh.depala@yorkshirewater.co.uk)) through email by 17:00 (GMT) on 16th December 2021. YW will periodically consolidate clarifications that would be relevant to everyone and share the response to these with all bidders anonymously.

Following an assessment of responses received for ITQ, successful suppliers will be invited to the RFP stage. This is planned for early February, but is subject to change based on YW discretion.

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

Quality criterion - Name: Software Demo / Weighting: 20

Quality criterion - Name: Delivery, Functional & Architecture Deep Dive / Weighting: 50

Price - Weighting: 30

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

Options: No

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## **Section IV. Procedure**

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

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

Negotiated procedure with prior call for competition

#### **IV.1.3) Information about a framework agreement or a dynamic purchasing system**

The procurement involves the establishment of a framework agreement

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

The procurement is covered by the Government Procurement Agreement: No

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

#### **IV.2.1) Previous publication concerning this procedure**

Notice number: [2021/S 000-029745](#)

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## **Section V. Award of contract**

### **Title**

Customer Interaction Management (CIM) - Professional Services

A contract/lot is awarded: Yes

### **V.2) Award of contract**

#### **V.2.1) Date of conclusion of the contract**

5 September 2022

#### **V.2.2) Information about tenders**

Number of tenders received: 8

The contract has been awarded to a group of economic operators: No

#### **V.2.3) Name and address of the contractor**

IBM United Kingdom Limited

Portsmouth

Country

United Kingdom

NUTS code

- UK - United Kingdom

Companies House

00741598

The contractor is an SME

No

#### **V.2.4) Information on value of contract/lot (excluding VAT)**

Initial estimated total value of the contract/lot: £9,021,846

Total value of the contract/lot: £9,021,846

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## **Section VI. Complementary information**

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

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

Yorkshire Water Services Limited

Bradford

Country

United Kingdom