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Tender

YWS Customer Relationship Management (Software Tool and Systems Integrator)

YORKSHIRE WATER SERVICES LIMITED

F05: Contract notice – utilities

Notice identifier: 2021/S 000-029745

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

Published 30 November 2021, 6:54pm

The closing date and time has been changed to:

7 January 2021, 12:00pm

See the [change notice](#).

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

Telephone

+44 7890034478

Country

United Kingdom

NUTS code

UKE41 - Bradford

Internet address(es)

Main address

<http://www.yorkshirewater.com>

I.3) Communication

Access to the procurement documents is restricted. Further information can be obtained at

<http://www.yorkshirewater.com>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://service.ariba.com/>

I.6) Main activity

Water

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
 - JA02 - For computer software
 - JA04 - For design
 - JA06 - For development
 - JA08 - Upgrade
 - JA21 - For developing

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..

The solution will replace a legacy suite of products several of which were developed 10-20 years ago and have technical constraints meaning YWS cannot readily develop them.

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)

II.1.5) Estimated total value

Value excluding VAT: £11,450,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 72211000 - Programming services of systems and user software
- 72212445 - Customer Relation Management software development services
- 72220000 - Systems and technical consultancy services
- 72240000 - Systems analysis and programming services
- 72250000 - System and support services
- 72261000 - Software support services
- 72263000 - Software implementation services
- 72265000 - Software configuration services
- 72266000 - Software consultancy services
- 72267000 - Software maintenance and repair services
- 72268000 - Software supply services

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) 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) 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

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: £11,585,000

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

Duration in months

84

This contract is subject to renewal

Yes

Description of renewals

Option to renew in 12 month increments up to a total term of 60 months, at YWS discretion.

II.2.10) Information about variants

Variants will be accepted: Yes

II.2.11) Information about options

Options: No

Section III. Legal, economic, financial and technical information

III.1) Conditions for participation

III.1.2) Economic and financial standing

Selection criteria as stated in the procurement documents

III.1.3) Technical and professional ability

Selection criteria as stated in the procurement documents

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Negotiated procedure with prior call for competition

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

Originally published as:

Date

21 December 2021

Local time

5:00pm

Changed to:

Date

7 January 2021

Local time

12:00pm

See the [change notice](#).

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

English

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: No

VI.2) Information about electronic workflows

Electronic ordering will be used

Electronic invoicing will be accepted

Electronic payment will be used

VI.4) Procedures for review

VI.4.1) Review body

Yorkshire Water Services Limited

Bradford

BD6 2SZ

Country

United Kingdom