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Tender

CRM and Loyalty Agency Services

FIRST TRENITALIA WEST COAST RAIL LIMITED

UK4: Tender notice - Procurement Act 2023 - [view information about notice types](#)

Notice identifier: 2025/S 000-030410

Procurement identifier (OCID): ocds-h6vhtk-054402

Published 5 June 2025, 5:24pm

Scope

Reference

FX1229

Description

1. Detailed CRM requirements are:

- Project Management/Client Services including status calls, timing plans and project updates
- Customer contact strategy to continue enhancing the CRM ecosystem with a focus on retention, increasing Average Transaction Frequency/Average Transaction Value and reducing churn
- Customer Acquisition: create an omni-channel strategy to effectively grow the customer base
- Campaign Planning: including testing and measurement plans

- Creative concepting: including idea generation, design, copywriting & wireframe
- Ability to demonstrates good ability for cross-agency collaboration
- Proactive approach to optimise current activity and pushing forward innovative ideas to drive customer engagement

2. Detailed Loyalty requirements are:

- Project Management/Client Services including status calls, timing plans and project updates
- Customer Acquisition: continue to develop the omni-channel strategy to effectively grow the Loyalty customer base
- Creative concepting: including idea generation, design, copywriting & wireframe utilising all available data points
- Ability to demonstrates good ability for cross-agency collaboration
- Proactive approach to optimise current activity and pushing forward innovative ideas to drive customer engagement, increase customer travel and increase reward redemptions.
- Optimise creative and strategy to increase Loyalty revenue penetration and growth and increase redemptions of rewards.

3. Account Management for CRM and Loyalty

- Dedicated Point of Contact

The Agency shall provide a dedicated point of contact available throughout the duration of the Agreement to deliver CRM and Loyalty account management services. A tiered account team - including a Senior Account Manager, Account Director, and Planning Director - will support varying strategic and delivery needs. The approach must be flexible and tailored, not "one-size-fits-all."

- Flexible Resourcing and Review

The Agency must demonstrate the ability to flex resourcing in response to shifting priorities and levels of activity. This team structure and resource mix will be subject to annual review to ensure continued alignment with the Client's evolving CRM and Loyalty goals.

- Resilience and Continuity

The Agency shall ensure continuity of service, including cover during absence, public holidays, or urgent requirements. This includes having sufficient resilience and senior oversight to maintain momentum on projects and meet deadlines.

- Agile and Responsive Delivery

The Agency must be able to respond quickly and effectively to fast-changing needs such as emergency sends, last-minute creative changes, or unplanned campaigns - while protecting timelines and budgets.

- Tailored Service Types

The Agency shall allocate a named account team to deliver across three levels of service depending on the nature of the Client's requirements:

- o Strategic Planning and Consultancy: Deep involvement in areas like loyalty proposition development, segmentation strategy, CRM vision, test-and-learn design, and journey mapping.

- o Creative and Tactical Campaign Delivery: Responsive, insight-led CRM campaign execution across key channels including email, push, and DM, with strong creative delivery and campaign management.

- o BAU/Operational Support: Execution of regular comms, performance tracking, stakeholder management, and creative adaptation, delivered consistently and reliably.

4. Retained Services

Ongoing Coordination and Performance Management

The Agency will attend weekly status meetings and monthly planning sessions to review project pipelines, resolve issues, and align on new priorities. In addition, quarterly business reviews will cover service levels, strategic direction, and overall relationship management.

The Agency shall:

- Provide the Client with a lead Account Director, supported by a Senior Account Manager and Planning Director under the agreed retainer model.
- Adhere to a structured workflow including briefing templates, planning timelines, and clear approvals governance.
- Offer a straightforward escalation path to resolve delivery or service issues efficiently.

- Ensure full transparency on scope and pricing. All projects outside the retainer will be quoted and billed separately, with clear estimates provided in advance.
- Share insights and counsel on CRM and loyalty trends, customer experience innovations, and regulatory developments.
- Provide training or capability-building sessions when appropriate to support Client team development.
- Flag any resourcing risks early and propose solutions to maintain service continuity.
- Comply fully with Data Protection Legislation and identify the designated Data Protection Officer(s) responsible for CRM data compliance.

Total value (estimated)

- £2,000,000 excluding VAT
- £2,400,000 including VAT

Above the relevant threshold

Contract dates (estimated)

- 1 January 2026 to 31 December 2028
- Possible extension to 31 December 2030
- 5 years

Description of possible extension:

The contract length is anticipated to be three (3) years with an option to extend for another 2 years (as a 1+1 option).

The spend indicated within this tender process is not fully committed as the actual annual budgets will be subject to approval by Department for Transport from time to time, usually annually. Please note, we would reserve the right to reduce or increase the budgets as

necessary at any point in time.

Main procurement category

Services

CPV classifications

- 79340000 - Advertising and marketing services

Contract locations

- UK - United Kingdom

Participation

Particular suitability

Small and medium-sized enterprises (SME)

Submission

Submission type

Requests to participate

Deadline for requests to participate

7 July 2025, 12:00pm

Submission address and any special instructions

<http://redirect.transaxions.com/events/1O0sY>

Tenders may be submitted electronically

Yes

Languages that may be used for submission

English

Award decision date (estimated)

17 November 2025

Award criteria

Name	Description	Type
Qualitative - 55%	. Response to the brief (Retainer Services) -5% • Case study and Experience - CRM - 15% • Case study and Experience - Loyalty - 15% • Agency Team Capability - 15% • Sustainability - 5%	Quality

Name	Description	Type
Contract Review - 5%	. Response to the brief (Retainer Services) -5% • Case study and Experience - CRM - 15% • Case study and Experience - Loyalty - 15% • Agency Team Capability - 15% • Sustainability - 5%	Quality
Price - 40%	• Retainer Fees - 10% • Case Study 1 Cost - 15% • Case Study 2 Cost - 15%	Cost

Weighting description

Qualitative 55%

Contract 5%

and

Price 40%

Other information

Conflicts assessment prepared/revised

Yes

Procedure

Procedure type

Competitive flexible procedure

Special regime

Utilities

Competitive flexible procedure description

This will be a three stage process including Pre-Qualification Stage (PQQ).

Following the evaluation of the PQQ responses, the Client will shortlist the Applicants it will invite to tender in accordance with the terms of the PQQ. The Client reserves the right to limit the number of Applicants that are invited to tender to a maximum of five (5) applicants. only applicants that score a "pass" for all non-qualitatively scored questions in the pqq will be considered and places will be awarded in order of highest to lowest score. the client reserves the right, in its absolute discretion, to invite more applicants if there is a tie in the scores between two or more applicants for the final place.

The PQQ will be followed by an invitation to tender (ITT) with shortlisted bidders. the shortlisted bidders from the PQQ will submit the written response on the ITT and there will be a further shortlist to a maximum of two or three (2 or 3) tenderers based on the evaluation of written response received.

These shortlisted tenderers (2-3) will then be taken forward to a presentation stage including a chemistry session before final evaluation and award.

The final scores for each tenderer will be added together, after application of the relevant weightings, to receive a final score for each tender. the tenders will then be ranked according to the final scores received to identify the most advantageous Tender.

The Client intends to award the contract to the highest scoring Tender.

Documents

Associated tender documents

<http://redirect.transaxions.com/events/1O0sY>

Contracting authority

FIRST TRENITALIA WEST COAST RAIL LIMITED

- Companies House: 10349442
- Public Procurement Organisation Number: PGLQ-8629-CMPG

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United Kingdom

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Region: UKI32 - Westminster

Organisation type: Public undertaking (commercial organisation subject to public authority oversight)