Leasehold Advisory Service
Free expert advice for you

Request for Proposal (RFP)

Customer Relationship Management (CRM) System for Leasehold Advisory Service (Lease).

1. Introduction

The Leasehold Advisory Service (Lease) is a publicly funded, independent organisation providing free advice to leaseholders, park homeowners and others in the residential leasehold and park homes sector.

LEASE is a dynamic organisation that combines a law firm, advice helpline, and policy team. We provide legal advice on complex and sometimes new issues, support vulnerable customers through our helpline, and help the government shape housing policy with expert insight and data. Over the next 18 months, LEASE will become a modern, digital-first organisation using AI, data, and automation to reach more people, deliver better advice, and create real impact.

We provide direct advice to the public by telephone (~25,000 calls per year) and email (~10,000) through ~16 qualified legal advisers. We are transforming our service and moving to a model where most people self-serve through automated advice and those we help directly we do so in a more efficient way. Therefore we are seeking a robust, flexible, and secure Customer Relationship Management (CRM) system that enables multi-channel communication (phone and email now, potential for webchat, IM etc later) as well as enabling our advisers to work significantly more efficiently.

Our direct advice service helps leaseholders and park homeowners with often complex and novel legal issues. While many of these issues we want people to be able to self-serve (e.g. “how do I extend my lease?”), others we need our staff to understand and advise on complex legal issues, these therefore cannot be treated like an IT support ticket, but rather our CRM must help the adviser understand the issue, draft responses quickly and efficiently, and allow for others to provide support where needed. Therefore we need a CRM which will:

1. Equip our reception, triage and legal team with tools that support smarter, more intentional ways of working—including the use of AI—ultimately enhancing the quality and timeliness of the advice we deliver to our customers.
2. Embed AI and automation throughout our advice-giving service including upon receipt of enquiries through all channels, responding to enquiries and the analysis and synthesis of data.
3. Establishing robust performance tracking and data analysis capabilities, enabling richer reporting and greater visibility of trends within the Leasehold and Park Homeowner communities. This will also allow us to better monitor the impact of legislative changes and ensure Lease responds more quickly and effectively to evolving customer needs.

This RFP invites qualified vendors to submit proposals for the provision, implementation, and ongoing support of a CRM solution tailored to Lease's needs.

2. Objectives of the CRM

The CRM should enable Lease to:

- Manage customer interactions efficiently (enquiries, advice given, follow-up, case management)
- Empower the advisers to provide accurate responses to advice requests fast and with high level of accuracy through use of a well curated knowledge base and well defined genAI tooling
- Standardise legal advice to improve advice quality and minimise legal risk
- Streamline advice management workflows, including triage and allocation to advisors
- Integrate or incorporate with communication channels (phone, email, web forms, live chat, AI assistant, other)
- Improve tracking of client demographics, needs, and outcomes
- Generate customisable dashboards and reports for monitoring demand, performance, and outcomes
- Ensure compliance with GDPR and relevant data protection/security requirements

3. Scope of Work

The selected vendor will be expected to:

1. **System Provision & Setup**
    a. Supply a cloud-based CRM system with secure hosting and role-based access
    b. Configure workflows for enquiry management, advice sessions, case notes, and escalations
    c. AI tooling to automate and support enquiry response, triage, and data analysis
2. **Integration**
    a. Integrate with existing Lease digital platforms (website, email, other)
    b. Provide API capability for potential future integrations
3. **Data Migration**
    a. Migrate existing client and case data from current systems/spreadsheets, including some level of data cleansing (to be defined as part of project)
    b. Ensure data integrity and accuracy during migration and validate it has been successful once complete.
4. **Training & Change Management**
    a. Provide user training for all user profiles
    b. Supply documentation and self-service guides
5. **Support & Maintenance**
    a. Offer ongoing technical support, troubleshooting, and upgrades.
    b. Provide clear SLAs for uptime, response times, and issue resolution

4. Functional Requirements

The CRM for Lease must support the full lifecycle of customer engagement, from initial enquiry through to resolution, follow-up, and reporting. It must accommodate diverse user roles and interaction types as defined in the service model. The high level outline of expected functions for each user group can be defined as below:

4.1 Core External Users (Customers)

- **Enquiry Submission:** Capture legal enquiries via website forms, AI assistant/chatbot, and assisted entry by reception staff
- **Omni-channel Integration:** Support customer touchpoints (website, AI chatbot, contact forms, surveys)
- **Customer Journey Tracking:** Record and manage progression from Lease's website self-service content to intake to resolution to feedback

4.2 Core Service Delivery Users (Frontline Roles)

- **Reception Staff:**
  - Ability to log calls, create assisted records, capture metadata.
  - Redirect or escalate enquiries to triage or advisers,
- **Triage Officers:**
  - Intake queue and workflow checklists for enquiry triage
  - Tools for signposting, allocation, escalation, and drafting standardised responses
- **Advisers & Senior Advisers:**
  - Case assignment, tracking, and management
  - Tools for drafting and reviewing responses (written or voice) which will support our goal of more consistent, high quality and more standardised customer outcomes
  - Escalation pathways for complex cases
  - Quality assurance (QA) functions for reviewing triage/adviser outputs
- **Senior Legal Managers:**
  - Oversight of adviser teams
  - Management of QA workflows
  - Ability to input policy and legal updates into CRM knowledge base

4.3 Service & Business Owners

- **Product Manager:**
  - Ability to configure workflow rules, business logic, allocation, and signposting resources
- **Operations Manager:**
  - GDPR compliance management, Subject Access Requests (SARs), data retention/deletion tools
  - Management of signposting resource lists and referral pathways
  - Policy and legal update management
- **Service Owner / Change Delivery Manager:**
  - Access to dashboards, reports, and metrics to evaluate CRM performance
  - Oversight of CRM alignment with service strategy

4.4 Data & Insights Roles

- **Data Analyst & Insights Manager:**
  - Dashboard and report creation
  - Business intelligence exports, data quality management, survey tools
  - Analytics strategy support for trend and performance analysis
- **Board of Directors:**
  - Access to high-level dashboards, KPIs, and reports for strategic oversight

4.5 Technical & Admin Roles

- **CRM Admin / IT:**
  - System configuration, user account management, audit logging, and updates
- **AI System Admin:**
  - Oversight of AI model training, trigger refinement, and ethical use monitoring
- **Content Expert:**
  - Knowledge base creation and maintenance (FAQs, checklists, templates)
  - Synchronisation with website CMS to ensure consistency across channels
  - Feedback loop integration from advisers and triage

4.6 Knowledge & AI Integration

- **Knowledge Base Management:** Structured content (FAQs, policies, checklists, standard responses) curated by legal/content experts
- **AI Support:** Ability for AI to serve responses to common enquiries using CRM knowledge base, aligned with Lease style and legal accuracy
- **Feedback Loop:** Capture adviser/triage feedback on knowledge usefulness to improve AI and content quality

4.7 Security & Compliance

- GDPR compliance (data access, SAR handling, retention/deletion policies, location)
- Role-based access and audit trails
- Encryption of data at rest and in transit
- Accessibility standards (AA+ WCAG 2.1 compliance)

The interactions flow chart is included in this RFP pack..

5. Proposal Submission Requirements

Vendors should provide:

1. Company profile and qualification evidence listed in Appendix 1 – Minimum qualifications of this requirement
2. Detailed description of proposed CRM solution, including technical architecture and AI tooling and capabilities
3. Outline of implementation and mobilisation plan, including timelines, decision points and milestones
4. Cost breakdown (licensing, implementation, training, ongoing support)
5. Details of support arrangements and SLAs
6. Approach to data migration
7. Data hosting (region) and security credential information
8. Business continuity assurance

6. Evaluation Criteria

Proposals will be assessed against the following criteria:

1. Alignment with Lease's requirements and objectives (30%)
2. User-friendliness and adaptability (15%)
3. Technical fit and capabilities including platform security & compliance, architecture and integration capabilities (15%)
4. Cost, vendor track record, and implementation plan (30%)
5. Potential innovation including how social value can be achieved (10%)

7. RFP Timeline

- **RFP Issued:** Thursday 16th October 2025
- **Deadline for Questions:** Thursday 23rd October 2025
- **Submission Deadline:** Thursday 6th November 2025
- Technical Demonstrations - date and format TBC
- **Evaluation Period:** 1 week

- **Decision & Notification:** Thursday 20th November 2025
- **Implementation Start Date:** TBC

8. Submission Instructions

Proposals must be submitted electronically in PDF format to: procurement@lease-advice.org
with the subject line: *"CRM Proposal – Leasehold Advisory Service"*

Any queries regarding this RFP should be directed to: Amandeep Wiechers
amandeepwiechers@lease-advice.org

9. Confidentiality

All information contained in this RFP and any responses provided by vendors will be treated as confidential and used solely for the purpose of evaluation.

Supporting documentation included within this pack:

1. Future CRM User Interaction Summary
2. Future CRM Feature Capability
3. Interactions Flow Diagram
4. Short Form Terms and Conditions

10. Appendix

Appendix 1 – Minimum qualifications

In order to qualify, providers will be expected to provide confirmation of, at a minimum:

- **Professional Accreditations**: Confirmation of current membership with a recognised professional body (e.g. CCRP, CRMS).
- **Insurance Coverage**: Evidence of valid professional, personal, and employer liability insurance.
- **Demonstrated Experience**: Submission of a minimum of 3 recent examples of relevant work undertaken for other clients, including appropriate reference details.
- **Financial Standing**: Provision of at least two years of audited or independently verified financial accounts.

- **Data Protection Compliance**: Evidence of compliance with the UK General Data Protection Regulation (UK GDPR), demonstrated through certification to an appropriate ISO standard (e.g. ISO/IEC 27001) or through equivalent, documented data protection and information security policies.
- **Ethical and Legal Compliance**: A written statement confirming the organisation's commitment to ethical and responsible business practices, including (where applicable) compliance with the provisions of the Modern Slavery Act.