

# Invitation to Tender

Chat & Messaging Platform



# Contents

|   |           |
|---|-----------|
| <b>Background</b>                             | <b>3</b>  |
| <b>Objectives</b>                             | <b>4</b>  |
| <b>A new Chat &amp; Messaging Service</b>     | <b>4</b>  |
| <b>Scope of Requirement</b>                   | <b>8</b>  |
| <b>Term of Contract</b>                       | <b>9</b>  |
| <b>About these instructions</b>               | <b>9</b>  |
| <b>Procurement Timetable</b>                  | <b>10</b> |
| <b>Tender Clarifications and Queries</b>      | <b>10</b> |
| <b>Conditions Applying to this Tender</b>     | <b>11</b> |
| <b>Tender Format</b>                          | <b>14</b> |
| <b>Selection Criteria</b>                     | <b>20</b> |
| <b>Appendix 1 - Statement of Requirements</b> | <b>21</b> |
| <b>Tender Response</b>                        | <b>25</b> |

# 1. Background

## What we do

- 1.1. Citizens Advice provides free, confidential and independent advice to help people overcome their problems. As the UK's largest advice provider we are equipped to deal with any issue, from anyone, spanning debt and employment to consumer and housing plus everything in between.
- 1.2. Citizens Advice helped 2.7 million people face to face, over the phone, by email and webchat in 2016-17. There were 43 million visits to our online advice service. We support witnesses in courts through the Witness Service and give pension guidance to people aged over 50. We're also the statutory consumer watchdog for the energy and post industries, meaning we advocate on behalf of consumers in these markets.
- 1.3. We have real time data from our millions of clients. This evidence helps us identify emerging issues, understand what is causing them and make recommendations to policymakers on how to fix the problems.
- 1.4. 2 in every 3 people who sought our help last year had their problem solved. Helping people solve their problems can stop issues getting worse and can save money further down the line. In 2016-17 we saved government and public services at least £430 million. You can read more about the impact of the Citizens Advice service in our 2016-17 [impact report](#).
- 1.5. More details about our service can be found on our [website](#).

## How we're structured

- 1.6. Citizens Advice is a network of around 300 independent local charities across England and Wales. Our services are provided by 23,000 trained volunteers and 7,000 paid staff.
- 1.7. We're in 2,700 community locations (including GP surgeries, libraries and courts) in England and Wales.

- 1.8. Each local Citizens Advice is a member of the national Citizens Advice charity. All together we form the Citizens Advice service.
- 1.9. Through the training, information systems and operational support it provides, national Citizens Advice equips local Citizens Advice to deliver the highest quality advice to their community.

## 2. Objectives

- 2.1. Citizens Advice wishes to appoint a partner to deliver a national chat & messaging platform, accessible to clients via our website ([citizensadvice.org.uk](http://citizensadvice.org.uk)) and other channels (e.g. Facebook Messenger) that's intuitive to use by local Citizens Advice volunteer advisers. The platform will need to be implemented with all testing and training completed by 16 March 2018 so that we are in a position to go live by 1 April 2018 at the latest. **Please note that this timeframe is critical and we will not be able to extend past the dates given.**
- 2.2. This document provides the high level specification for the solution; and details of how tender responses will be scored. A separate Appendix 1 Statement of Requirements provides further details of the requirements and the response template which bidders should complete.

## 3. A new Chat & Messaging Service

Definitions of user groups used throughout:

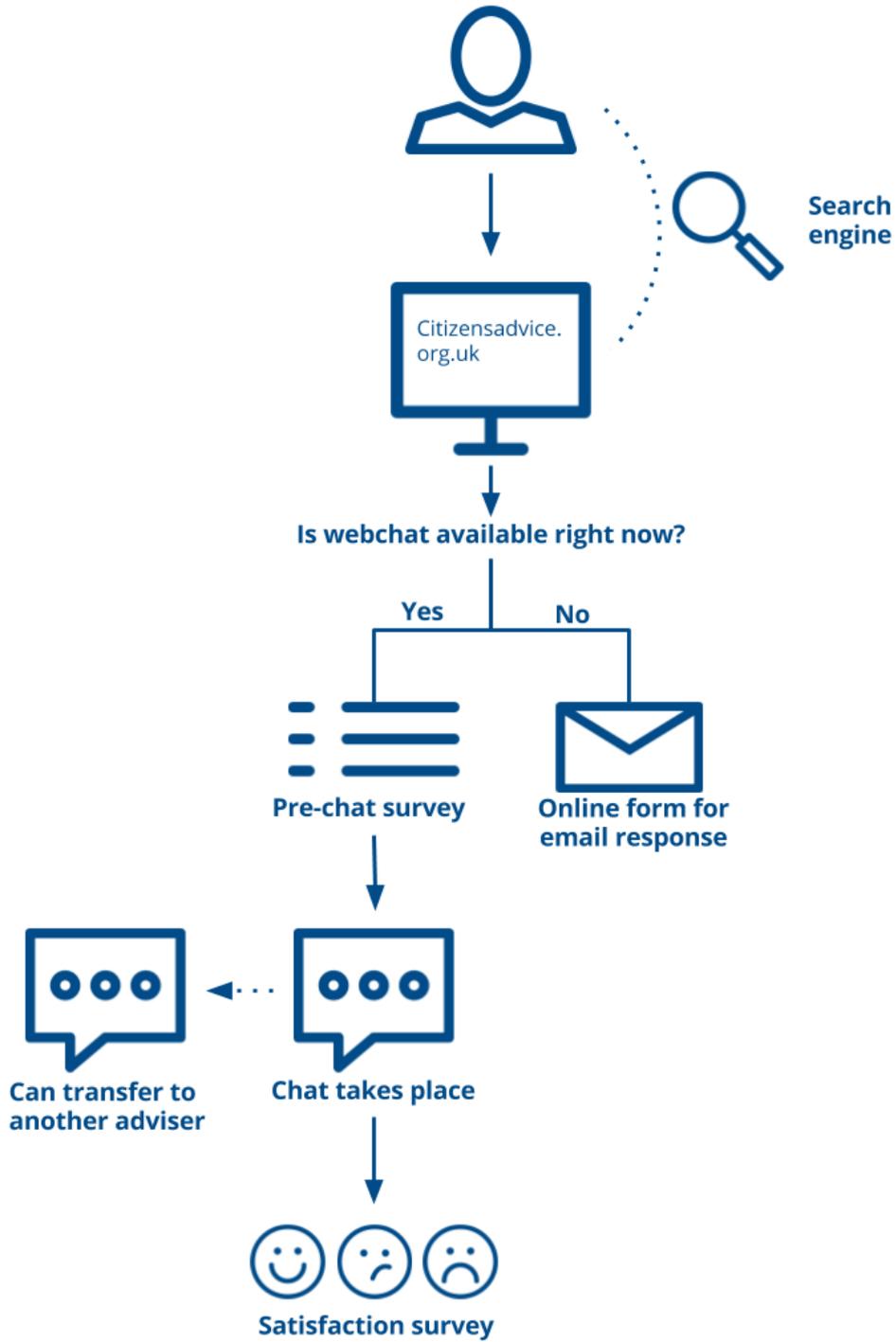
- Clients - the members of the public who we give advice to, they are at the heart of what we do (comparable to 'customers')
- Advisers - our volunteers and paid staff who deliver services to clients (comparable to 'agents')
- Supervisors - staff who supervise advisers
- Operational staff - staff in our national offices who monitor and administer the service

- 3.1. Citizens Advice has been offering online advice using live webchat and email since 2015. The service is offered on certain pages of our self-service advice website ([citizensadvice.org.uk](https://citizensadvice.org.uk)). The webchat service provides online advice from a trained adviser. If we don't have an adviser available, the client can fill in a form to receive advice by email.
- 3.2. Feedback from advisers and clients about using the service has been positive, and we are now looking to develop the chat and messaging services so they are more accessible and available to more people.
- 3.3. Chat and messaging technologies are evolving fast, and we want to ensure that our service is future proof and developing in line with people's changing expectations and how people want to access advice. Digital technologies such as in-application messengers, SMS, voice and automation all offer routes to expanding and improving the service.
- 3.4. We also want to expand the scope of the service. We currently offer online advice on a wide range of topics such as benefits, work, housing, relationships and family, law, and immigration. We also offer specialist debt advice through a project funded by the Money Advice Service in England and Wales and through a separate debt service in Northern Ireland. The Witness Service also uses webchat to help witnesses across England and Wales prepare to go to court.
- 3.5. We plan to include the Consumer service (formerly Consumer Direct) in our chat & messaging service in the future. This will mean we will also be helping clients in Scotland, expanding the service to the whole of the UK.
- 3.6. Our guiding principles for the service are:
  - **Accessibility** - our clients want a service they can access easily, including those that need to access with support or assistive technology. The service should meet external accessibility standards.
  - **Usability** - our clients want to access a service that feels familiar, on their own device, whatever model.
  - **Availability** - our clients want a free advice service that is available when they need it.

- **Problem solving** - our clients want a service that gives them the right information and advice to help them move forward.
- **Holistic and preventative** - our clients need a service that helps them spot any related issues.
- **Personalised** - our clients need a service that gives them a record of the advice they have been given and any next steps they need to take.
- **Integrated** - our clients want a joined up service no matter what channel they choose.
- **Secure and confidential** - our clients expect us to protect their data and act responsibly at all times.

### 3.7. **The client journey**

The current journey a client would take through the chat & messaging service is illustrated below.



## 4. Scope of Requirement

- 4.1. The chat & messaging platform needs to be accessible to clients via our website ([citizensadvice.org.uk](https://citizensadvice.org.uk)) and other channels (e.g. Facebook Messenger), and intuitive to use by local Citizens Advice volunteer advisers. It needs to meet our accessibility and security standards, as set out in Appendix 1.
- 4.2. The chat and messaging platform would need to support a service at scale and across multiple locations. We currently handle around 100,000 contacts a year, and would expect this to scale to around 1m contacts a year within two years. This service is delivered by 500 active advisers each month. Due to the volunteer nature of our organisation we can have up to 3,000 adviser user accounts registered at any one time although not all users are active concurrently. Again, we'd expect this group to grow as we expand the service.
- 4.3. We know we are not meeting the full demand for this service and we want to be able to help more people in the future by increasing capacity. We need a platform with tools that allow us to better manage and report on our workforce as well as giving us analytics to better understand client demand and needs.
- 4.4. The platform must allow us to innovate and add in new features in the future. Having completed user research we have found that our service could benefit from features such as (but not limited to):
  - Co-browsing
  - Document sharing
  - Social media integration
  - Video calling
- 4.5. The service administration and operational support is carried out in one of our central national offices, however we have supervisors working in over 90 local offices who manage the advisers day to day. We need a platform which provides a dashboard to each supervisor so they can manage their own advisers. Nationally we need an administration system

which allows us to control and monitor the entire service and produce accurate performance reports.

- 4.6. Appendix 1 Statement of Requirements contains more details about our requirements.
- 4.7. The table in the Functional Requirements section requires you to respond to each requirement to state if you can currently provide this functionality or if it can be developed. If you can provide further information to help us understand how you can meet the requirement enter it here. We will score each requirement to help us evaluate.

## **5. Term of Contract**

- 5.1 The contract will be for an initial term of 2 years subject to satisfactory performance. There will be an option to extend the contract for further 12 month periods subject to a maximum of 24 months and a continued requirement for the solution.

## **6. About these instructions**

- 6.1. These instructions are designed to ensure that all tenders are given equal and fair consideration. Therefore, it is important that you provide all the relevant information in the required format and order specified.
- 6.2. Please note that references to Citizens Advice, throughout these documents means any person who is authorised to act on behalf of Citizens Advice in matters pertaining to the Assignment Contract.
- 6.3. Tenders are invited in accordance with all sections of this Tender Document. All prospective bidders should read these instructions carefully before completing the remaining documentation. Failure to comply with these requirements for the completion and submission of Tenders may result in the rejection of a Tender as a whole on the grounds of non-compliance.

## 7. Procurement Timetable

### 7.1. Timetable (may be subject to revision)

| Date        | Activity                             |
|-------------|--------------------------------------|
| 04/12/17    | Issue Invitation to Tender           |
| 15/12/17    | Deadline for submission of questions |
| 21/12/17    | Response to questions                |
| 05/01/18    | Tender return date                   |
| 26/01/18    | Bidder presentations (if required)   |
| 29/01/18    | Evaluation and award                 |
| 08/02/18    | Finalise contract                    |
| Feb 2018    | Building and implementation          |
| 19-26 March | Go Live                              |

## 8. Tender Clarifications and Queries

- 8.1. Any required tender questions or clarifications should be sent by e-mail to: [cita-centralprocurement@citizensadvice.org.uk](mailto:cita-centralprocurement@citizensadvice.org.uk)
- 8.2. Any communication during the tender process must be to the email address above. Failure to comply with this requirement may result in your tender being excluded from the process.

- 8.3. Responses to questions from bidders will be issued as soon as practically possible to all those invited to tender.
- 8.4. To ensure that bidders have sufficient time to take account of any answers given, please note that the deadline for submission of questions is 5.00pm on 15 December 2017.

## **9. Conditions Applying to this Tender**

### **Proposal Conditions**

- 9.1. Submission of a tender proposal does not commit Citizens Advice to award a contract.
- 9.2. Each bidder assumes all risks for resource commitment and expenses in respect of preparing the tender proposal, and participation throughout the inquiry process. Only the complete execution of a written contract by both parties will obligate Citizens Advice in accordance with the terms and conditions therein.
- 9.3. Offerings and bids, as supplemented and/or modified by pre-selection negotiations may be accepted by Citizens Advice and become part of the final and binding contract.

### **Terms of Payment**

- 9.4. The supplier shall invoice Citizens Advice as agreed and specified in the Contract. Payment will normally be made within 30 days of the receipt of a valid invoice.

### **Tender Submission**

- 9.5. Tender proposals must be submitted to Citizens Advice by returning your Tender Response, the General Further Competition Order Form and attachments i.e. the information you are supplying in response to the Invitation to Tender.
- 9.6. Please provide 1 hard copy and an electronic copy (MS Word), via email, of your tender proposal.

- 9.7. Tenders are to be clearly labelled and submitted by recorded delivery (or other method that requires a signature) to the address below, no later than 12.00 noon (GMT) Friday 5 January 2018.

### **Tender for Chat & Messaging Platform**

Citizens Advice  
Procurement Department  
3rd Floor North  
200 Aldersgate  
London  
EC1A 4HD

- 9.8. E-mail address – [cita-centralprocurement@citizensadvice.org.uk](mailto:cita-centralprocurement@citizensadvice.org.uk)
- 9.9. Bidders are expected to demonstrate they have the current relevant experience, expertise and resource capacity to deliver the services outlined in the Scope of Requirement and Statement of Requirements in Appendix 1. A simple statement that the requirement can be met is not sufficient.
- 9.10. Whilst every endeavour has been made to provide an accurate description of the requirements, prospective legal providers should form their own conclusions about the methods and resources needed to meet those requirements. Citizens Advice will not accept responsibility for the bidders' assessment.

### **Incomplete Tenders**

- 9.11. Tender proposals may be rejected if the complete information required is not provided at the time of tendering.
- 9.12. Bidders should ensure that they are familiar with the award criteria and be aware that they will not receive scores for incomplete answers.

### **Receipt of Tenders**

- 9.13. Please ensure that your Tender proposal is delivered no later than the tender return date. Tender proposals received after the closing date and time will not be accepted.

## **Acceptance of Tenders**

- 9.14. By issuing this invitation, Citizens Advice is not bound in any way and does not have to accept the lowest or any tender proposal and reserves the right to accept the whole or any specified part of the tender unless the bidder expressly states otherwise.

## **Period for which Tenders should remain valid**

- 9.15. Unless otherwise stated, your initial tender shall remain valid for 60 days from the closing date for receipt of tender response.

## **Presentations**

- 9.16. Bidders may be asked to present and/or clarify their overall proposals. Successful shortlisted bidders will be notified at a relevant period to arrange the time of the presentations. We would expect to see a demonstration of the platform and its features during this presentation.

## **Amendments to the Tender Documents by Citizens Advice**

- 9.17. Citizens Advice reserves the right to amend the enclosed documents at any time prior to the tender return date. Any such amendment will be numbered, dated and issued by the Citizens Advice Procurement Team. Where amendments are significant, Citizens Advice may at its discretion extend the deadline for receipt of tender responses.

## **Inducements**

- 9.18. Offering an inducement of any kind in relation to obtaining this or any other contract with Citizens Advice will disqualify your tender from being considered and may constitute a criminal offence.

## **Negotiations/Contract Finalisation**

- 9.19. The preferred bidder(s) will be notified that Citizens Advice wishes to enter into negotiations to finalise the terms and conditions of the proposed contract.
- 9.20. The contract will be negotiated between both parties on the basis of the Invitation to Tender (ITT), the bidder's response to the ITT and

subsequent discussions and correspondence.

- 9.21. Citizens Advice reserves the right to commence negotiations with any other party should it be unable to reach mutual agreement with the recommended legal bidder.

### **Debriefing**

- 9.22. Following the award of contract, all unsuccessful bidders will be notified. Debriefing/feedback will be provided on request.

### **Confidentiality**

- 9.23. All information supplied by Citizens Advice to you must be treated in confidence and not disclosed to third parties except insofar as this is necessary for the purposes of submitting the tender proposal. All information supplied by you to Citizens Advice will similarly be treated in confidence except for the disclosure of such information with regard to the outcome of the procurement process.

### **Disclaimer**

- 9.24. Whilst all reasonable care has been taken in compiling this document, no warranty or guarantee (expressed or implied) is given by Citizens Advice as to the completeness or accuracy of the document, or any information provided in connection with it.

## **10. Tender Format**

- 10.1. This guidance details the information you should provide in your response to the ITT and by which your tender will be evaluated. You are requested to limit your submission to information which is specifically aimed at demonstrating how you will meet the requirements. Information and marketing literature of a general nature are not required.
- 10.2. Ensure that all attachments included such as brochures, reports, templates and forms are clearly cross-referenced in the Tender Response document.

- 10.3. The bidder should nominate a person for the purpose of answering queries, which may arise during the evaluation phase. The name, title, address (including e-mail address) and telephone number of that person should be included in the tender.
- 10.4. The headings under which your response should be structured are:
- Organisation Information
  - Method Statement
  - Project Management
  - Added Value
  - Quality Assurance and Performance Management
  - Pricing Structure
  - References
  - Conclusion
- 10.5. Further details on each section are given below. Your tender should enable us to evaluate your understanding of our requirements and the quality of your proposals for meeting them. Therefore it should describe clearly how you propose to provide the services set out in Appendix 1.
- 10.6. These sections will also be the criteria against which proposals will be evaluated.
- 10.7. Pricing structure will be considered separately.

### **Organisation Information**

- 10.8. This should provide an overview to your organisation and details of relevant experience your organisation has of carrying out similar services, including specific examples.
- 10.9. Provide details on the proposed team dedicated to this contract including details of their experience, the availability of staff and any associated lead times.
- 10.10. Provide a statement that there are no conflicts of interest and, in the case of a conflict arising, please explain how this will be managed.

## **Method Statement**

- 10.11. The purpose of the method statement is to enable Citizens Advice to evaluate your understanding of these requirements and the quality of your proposals for meeting them. Your method statement should outline your understanding of the Scope of Requirement and how you propose to provide the required services. You should also provide details of how you would deliver the requirements in Appendix 1 in the Method Statement as well as completing the table for the Statement of Requirements which requests confirmation of the technical capabilities of the solution. You should quote any relevant timescales as well as any alternative proposals you want to make.
- 10.12. Please be specific about unique service offerings, with particular emphasis on meeting Citizens Advice requirements and supporting us in fulfilling our Objectives.
- 10.13. Your response should contain additional information you think would be helpful in support of your tender response, including screen shots and links/access to demo sites.

## **Project Management**

- 10.14. Please provide details of your project management approach to successfully implement the platform.
- 10.15. Provide a high level project plan including a work plan showing key dates and milestones with clear outputs and deliverables, including how you would phase the work.
- 10.16. Provide an indication of the success criteria that will enable the project to move forward. Ensure that there is clarity on how long each phase of the project should take and a specified delivery date.
- 10.17. The project plan should include the following key milestones and deliverables for each of your proposed phases:

| Milestones            | Deliverables                            |
|-----------------------|---|
| <b>Design</b>         | Project plan                            |
|                       | Functional plan                         |
|                       | Technical plan                          |
|                       | Test plan and scripts                   |
|                       | Training plan                           |
| <b>Build</b>          | Configuration and development           |
|                       | Systems integration and test            |
|                       | Performance test                        |
|                       | Production environment                  |
|                       | Training documentation                  |
|                       | Knowledge transfer (to Operations Team) |
| <b>Implementation</b> | Deployment plan                         |
|                       | User acceptance testing                 |
|                       | Go live                                 |
| <b>Operation</b>      | Training                                |
|                       | Transition to support                   |

## **Added Value**

- 10.18. Provide details of added value services, not included in the Statement of Requirements, which your firm offers as part of your proposal that will add value to the service that you will provide (including cost implications).

## **Quality Assurance and Performance Management**

- 10.19. Include proposals for liaison in relation to account and contract management with Citizens Advice's representatives during the term of the contract to enable progress to be monitored and levels of service to be evaluated.
- 10.20. Please describe the quality assurance management, performance management and professional support systems that are in place to ensure that an appropriate level of expertise and quality of service will be provided to Citizens Advice
- 10.21. Please indicate what your firm considers to be key performance indicators as a basis to monitor and measure service levels, target service levels and the actions. Please detail what action you would take if Citizens Advice was not satisfied with the quality of service being provided.
- 10.22. Provide a copy of your quality assurance framework as designed to ensure the quality of service provision.
- 10.23. Provide a copy of your proposed Service Level Agreement to reflect the service delivery expectations.
- 10.24. Provide details of Management Information and reporting capabilities and include examples as attachments.

## **Pricing Structure**

- 10.25. Citizens Advice needs to be able to differentiate between the tender responses from different firms for the provision of services. Citizens Advice values both competitiveness and service provision although, whilst clearly important, the ultimate decision is unlikely to be based on price alone.

- 10.26. Pricing for implementation and ongoing provision of your solution (licensing if relevant), maintenance and support services should be provided as part of your tender.
- 10.27. If you are proposing a licensed solution the pricing should explain how licenses are calculated, how we control our costs (what happens if all users log on).
- 10.28. The pricing model should explain how incremental changes, if any, will be made. This is important due to the likely increase to the number of advisers and contacts.
- 10.29. All daily rates should be inclusive of management, travel and any other overheads.
- 10.30. Citizens Advice welcomes alternative cost proposals and where these are provided they must be clearly marked.
- 10.31. The Review Team will use this information for confidential pricing analysis and benchmarking for the purpose of helping to choose the preferred bidder.

## **References**

- 10.32. Please provide references (names, telephone numbers and details of service provided) for 3 organisations of similar size and nature, for which you have provided similar services within the last 3 years, from whom Citizens Advice may seek a reference.

## **Conclusion**

- 10.33. Please summarise the reasons Citizens Advice should appoint your firm for the provision of the requirements as set out in this Invitation to Tender.

# 11. Selection Criteria

- 11.1. The selection process will be conducted to ensure that tender responses are reviewed and evaluated impartially to ascertain the most cost effective tender in terms of price, technical merit, demonstrated ability to meet delivery dates, quality of service, understanding of the requirement, approach, methodology, value added and relevant experience.
- 11.2. Account will be taken of any factors which impact on the bidders suitability that emerge from the tendering process and in relation to information previously available.
- 11.3. Citizens Advice will evaluate tenders in accordance with the weighted criteria set out in the table below.
- 11.4. Pricing structure will be considered separately.

| Criteria | Section                                      | Weighting (%) |
|----------|--|---------------|
| 1        | Organisation Information                     | 15            |
| 2        | Method Statement                             | 50            |
| 3        | Project Management                           | 15            |
| 4        | Added Value                                  | 5             |
| 5        | Quality Assurance and Performance Management | 10            |
| 6        | References                                   | 5             |

# Appendix 1 - Statement of Requirements for Citizens Advice Chat & Messaging platform

November 2017

Your tender submission should use this document as a template, please complete each section as instructed. There is no word limit so you can increase table sizes to accommodate your response. If you are attaching documents please ensure that the file name is inserted in the relevant section so we can cross reference.

## Background

Citizens Advice offer online webchat and email advice on [citizensadvice.org.uk](http://citizensadvice.org.uk) to clients all over the United Kingdom. We require a platform that meets our current needs but will allow us to expand the service in the future. To do this we would need a platform that gives us:

- Flexible and modular build to allow for iteration based on feedback
- Accessible, intuitive design, that's properly responsive on a range of devices including mobile
- An API that allows for integration with other channels and platforms
- Analytics, live data and trend reporting, potentially integrated with Google Analytics
- Reliable scaling to large numbers of users with no performance issues

Our current usage:

- around 100,000 contacts handled each year
- over 3,000 registered user accounts with around 500 active concurrent users each month
- a range of different skillsets representing the wide range of advice topics we deliver

**The following requirements A1 to A13 should be responded to in the Method Statement (Section 3 below)**

## **A1. Technical requirements**

We are procuring a solution that gives:

- Client/customer interface
- Adviser/agent interface
- Ability to complete live chats
- Ability to offer an email/ticket solution when chat not available
- Additional useful features such as co-browsing, document sharing, social media integration, video calling
- Reporting and user analytics

## **A2. Users**

The platform should support at least 500 concurrent users. However it should be possible to set up unlimited users or at least 10,000 separate user accounts.

Skillsets or similar should be used to determine how chats/emails are delivered to advisers, and it should be possible for an adviser to have multiple skillsets.

## **A3. Ease of Use**

As the majority of advisers will not be using the software regularly, it is important that the adviser interface is simple, with minimum input required for the adviser to interact with clients.

## **A4. Accessibility**

The client and adviser interface should meet the accessibility requirements set out here: <https://www.w3.org/TR/WCAG20/> and should be compatible with the JAWS screen reader software. If the agent interface does not currently meet these requirements we would expect the supplier to be working towards this, and to provide a timeline for completion.

## **A5. Security**

You should advise us what security standards the solution is compliant with. Within the functional requirements section there are specific points in relation to this that you should comment on.

## **A5. Transition**

We would expect the supplier to work with us and our existing supplier if necessary to ensure that there is a smooth transition period and there is no break in service for our clients. This would include:

- Duplicating existing services
- Duplicating user accounts
- Roll back plan

## **A6. Scalability**

We anticipate that over the period of the contract the volume of client interactions will increase, and we will look to increase the availability of advisers to meet this demand. This will lead to increased traffic, so we are looking for a solution which can be scaled up as necessary both in terms of users and volumes of webchat or other interactions on the platform with our clients.

## **A7. Future Proofing & Compatibility**

We envisage integration of the platform with other services in the future through an API. Integration with our CRM and other applications in the future would be needed.

## **A8. Performance**

We would expect the system performance to reflect the immediate nature of our business, which requires us to provide up to the minute reporting and performance information. This would include real time dashboards as well as comprehensive reporting.

## **A9. Consultancy**

We expect that that there would be some consultancy time throughout the design and build of the solution, which would be included in the implementation cost.

## **A10. Training**

We would expect full training to be given to our key operational staff members so that they can train our network of advisers. We would need supporting materials such as user guides and also access to a training version of the platform for practical training.

We would expect the cost of training for implementation to be included in the bid and for the costs of future training to be made available.

### **A11. Support/Helpdesk**

We would expect a helpdesk to be available to help our in house team during business hours. This would at least be 9:00 - 17:00 Monday to Friday and would ideally be 8:00 - 18:00.

We would expect SLA's that take account of our business need and where we have a business critical issue, for problems to be solved promptly.

We would expect there to be additional help resources that may include FAQ's, knowledgebase, user forums etc.

### **A12. Account Management**

We would expect to be allocated a proactive account manager. They will ensure that we are happy with the services provided and that we feel our needs are being met. They will understand our business model and that as a charity organisation working across multiple locations, we can have unique requirements. They will keep us informed of planned development and new features that will help us achieve our goals and improve how we work.

Please provide details of how you will support us in managing, improving and developing the service.

### **A13. Disaster Recovery**

Please provide details of service resilience and Disaster Recovery. This should include brief details of data centres, what happens if they fail and actual down time in the last 12 months. Whilst our service is predominantly 9 to 5 Monday to Friday we do operate outside of these hours so we would need to understand how you update the servers and if there is a going to be any scheduled maintenance that will affect service delivery. If the data centres do go down, we would also need to understand the capacity to deliver our services and any priorities that you have for services, i.e. How quickly we can be back up and working.

# Tender Response

Please complete the following sections as per instructions below. You should refer to Appendix 1 to complete the Method Statement in section 3.

## 1. Organisation Information

Please provide an overview to your organisation and details of relevant experience your organisation has of carrying out similar services including specific examples.

Provide a statement that there are no conflicts of interest and, in the case of a conflict arising, please explain how this will be managed.

## 2. Method Statement

Your method statement should outline your understanding of the Scope of Requirements and how you propose to provide the required services. As a minimum you should provide details of how you would deliver tasks as per the requirements above quoting any relevant timescales as well as any alternative proposals you want to make.

NB: Where possible you should also include links to examples of your platform whether a demo or in a live environment on one of your customer's sites. Alternatively screenshots of things like the customer and agent interfaces, supervisor dashboards, examples of reports and analytics would be useful.

Please ensure that you cover all of the requirements A1-A13 in Appendix 1.



Provide details on the proposed team dedicated to this contract including details of their experience, the availability of staff and any associated lead times.



## **Functional Requirements**

For a full list of the functional requirements please see the Excel document called [platform requirements\\_chat and messaging project 2018/19](#)

**The Functional Requirements document forms part of your method statement and as such accounts for a large part of the evaluation scoring** (see selection criteria in Invitation to Tender document).

Please complete the supplier comments section within each tab of the document, identifying which requirements that your solution can provide and which it cannot, and if relevant which are being developed. You have space to provide supporting comments on each requirement.

### 3. Project Management

Please provide details of your project management approach to successfully implement the platform.

Provide a high level project plan including a work plan showing key dates and milestones with clear outputs and deliverables, including how you would phase the work.

Please attach your plan as a separate PDF. Enter the filename here so we can easily cross reference.

Provide an indication of the success criteria that will enable the project to move forward. Ensure that there is clarity on how long each phase of the project should take and a specified delivery date. Any other comments supporting your project plan should be entered here.

#### **4. Added Value**

Provide details of added value services not included in 3. Statement of Requirements which your firm offers as part of your proposal that will add value to the service that you will provide (including cost implications).

#### **5. Quality Assurance and Performance Management**

Include proposals for liaison in relation to account and contract management with Citizens Advice's representatives during the term of the contract to enable progress to be monitored and levels of service to be evaluated.

Please describe the quality assurance management, performance management and professional support systems that are in place to ensure that an appropriate level of expertise and quality of service will be provided to Citizens Advice

Please indicate what your firm considers to be key performance indicators as a basis to monitor and measure service levels, target service levels and the actions. Please detail what action you would take if Citizens Advice was not satisfied with the quality of service being provided.

Provide a copy of your quality assurance framework as designed to ensure the quality of service provision.

Please attach document. State the file name here so we can cross reference.

Provide a copy of your proposed Service Level Agreement (SLA) to reflect the service delivery expectations.

Please attach document. State the file name here so we can cross reference.

Provide details of Management Information and reporting capabilities and include examples as attachments.

Please attach documents. State the file names here so we can cross reference

## 6. Pricing Structure

Citizens Advice needs to be able to differentiate between the tender proposals from different firms for the provision of services. Citizens Advice values both competitiveness and service provision although, whilst clearly important, the ultimate decision is unlikely to be based on price alone.

Pricing for the ongoing provision of your solution (licensing if relevant), maintenance and support services should be provided here. All implementation costs should be given and a table showing day rates for professional services. All daily rates should be inclusive of management, travel and any other overheads.



If you are proposing a licensed solution the pricing should explain how licenses are calculated, how we control our costs (what happens if all users log on).

The pricing model should explain how incremental changes, if any, will be made. This is important due to the likely increase to the number of advisers and client contacts.

## 7. References

Please provide references (names, telephone numbers and details of service provided) for 3 organisations of similar size and nature, for which you have provided similar services within the last 3 years, from whom Citizens Advice may seek a reference. Please state why the references given are relevant to Citizens Advice.

| Organisation | Contact Name | Telephone Number | Service provided (Brief details – 300 word maximum) |
|--------------|--------------|------------------|---|
|              |              |                  |   |
|              |              |                  |   |
|              |              |                  |   |

## 8. Conclusion

Please summarise the reasons Citizens Advice should appoint your firm for the provision of the requirements as set out in this Invitation to Tender.

|  |
|--|
|  |
|--|