



SCISYS UK LTD
The National Archives
Customer Relationship Management
System and Integrated Email Marketing Solution

RESPONSE TO TENDER



The National Archives

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Commercially Sensitive sections of this document are:

Appendix B

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1 EXECUTIVE SUMMARY

**CRM solution to
provide reliable
customer
management and
email marketing
capability**

SciSys UK Ltd is very pleased to tender in partnership with Pythagoras Communications to provide a Customer Relationship Management System incorporating a customer management database and email marketing solution, in line with the requirements of The National Archives.

The CRM implementation will provide a customer database module which will meet the following high level business requirements:

- To make customer data (both consumers and business contacts) easily accessible to non-technical staff at the National Archives (e.g. the marketing team) maintenance of customer data, analysis of customer and other data.
- To ensure that customer data is captured in a more consistent fashion and to a higher quality than at present.
- To minimise the duplication of customer records.
- To capture customer sign-up data via a registration form or forms on the National Archives website:
www.nationalarchives.gov.uk

It will also provide an Email Marketing solution that will meet the following business requirements:

- To create email content in html format using a set of pre-defined templates – these templates will be built by the National Archives.
- To deliver email content to selected customers.
- To track the effectiveness of each email campaign.

Further details of how this will be achieved are given in the remainder of this proposal and in our response to the Functional Requirements outlined in Appendix A.

**CRM expertise
provided with
Buying Solutions
peace of mind**

SciSys is bidding with Pythagoras in a unique partnership to provide the in-depth technical and domain experience required to provide the solution within short timescales, under the auspices of the trusted Buying Solutions framework.

Both companies bring extensive experience of providing IT Services to a wide range of organisations, providing technical expertise within tried and tested project management and quality assurance

**Reliable solutions
underpinned by
PRINCE2 and ISO
credentials**

processes to ensure successful, timely delivery. For example, both SciSys and Pythagoras have adopted PRINCE2 project and programme methodologies to underpin the delivery of software systems, and both organisations are accredited with ISO 9001 with respect to the provision of IT software and services.

As a team, we bring proven expertise in the Microsoft Dynamics CRM tool, with the benefits of procuring through the Buying Solutions framework, allowing faster procurement timescales, the ease of established terms and conditions and the security of choosing a supplier which has met the challenging credentials demanded for inclusion on the Buying Solutions catalogue.

SciSys has chosen to partner with Pythagoras in the delivery of this solution as we believe that they bring a wealth of expertise in CRM customisation, deployment, training and support and an excellent track record of working within Government and not-for-profit organisations.

Pythagoras has ten years experience of offering expertise in evaluating and implementing CRM solutions. The range of services provided by Pythagoras includes strategy development, business process management, technology implementation and training. Pythagoras has successfully implemented many projects across a wide range of industries including the public sector, healthcare and many service-based organisations.

**SciSys and Pythagoras
bring CRM expertise,
knowledge of TNA and
the vision and
experience for future
growth and extension**

With a deep knowledge of the drivers within Government organisations; an existing working relationship with TNA; and with an unrivalled CRM technology experience, Pythagoras is a natural choice as partner to SciSys.

SciSys will manage all commercial arrangements and issues, providing project governance across the delivery, while Pythagoras and SciSys will work closely with the key stakeholders at TNA to rapidly deploy a CRM solution providing a customer database manager and email marketing, which can be extended and further implemented in the future.

In summary, our partnership offers:

- **Flexibility and scalability** – TNA's processes and requirements may change over time and our system will be able to accommodate this without excessive expense or degradation to system performance.

- **Powerful, reliable and easy to use reporting capabilities** – for contact management and email marketing strategic analysis.
- **Support for workflow processes** – providing automated communication wherever necessary to increase efficiencies across the organisation.
- **Intuitive, easy to adopt interfaces for all users** – allowing speed of transition as well as speed of deployment.
- **Support for remote access**
- **Flexible security model** – including full support for compliance with the requirements of the Data Protection Act wherever required.
- **Full integration capability** – with TNA's numerous other external systems that will remain stable enough to adapt to changes in synchronisations and upgrades to either CRM or linked systems in the future.
- **Quality** – delivering assured solutions to agreed parameters using tried and tested methodologies.
- **Domain Knowledge** – first hand knowledge of the organisation, its goals and drivers and the technical environment in which the CRM solution will sit.

2 PROVISION OF GENERAL BUSINESS INFORMATION

2.1 *Overview of SciSys*

SciSys is a systems and software house with nearly 30 years experience of providing software-related services and solutions.

We provide software intensive solutions to customers through the development of software applications and by seamlessly integrating both COTS and bespoke software and hardware.

We provide professional services relating to all aspects of the software project lifecycle, providing a full range of technical and business consultancy services to enable organisations to capitalise on the benefits offered by information technologies.

SciSys has a proven track record of providing cost effective services across a variety of market sectors including Government, Defence, Space and Charities. The capabilities of the Company can be summarised as follows:

- Requirements Capture and Definition
- Design Studies
- Business and Technology Consultancy
- Software Development and System Integration
- Applications and Facilities Management
- Training Systems
- Programme and Project Management
- Maintenance and Support

We currently employ over 400 staff and have an annual turnover of c£40M. Our success is built on our track record of delivering quality services on time and to budget, using methods and procedures which deliver reliable solutions and are fully conformant with ISO 9001:2008 and ISP 14001 (Environmental Management System).

SciSys has a long and impressive track record in providing IT solutions and professional services to significant public sector bodies, with accreditation to connect to and support applications on the Government Secure Intranet (GSI). We have been working with The National Archives for the past 3 years, since winning a contract under the Buying Solutions framework to provide support and enhancements for the Documents Online and DORIS applications. Following a successful transition from the incumbent supplier, SciSys has also successfully delivered a number of significant developments to these applications, bringing additional user benefits and technology enhancements.

SciSys only partners with companies that have been through our stringent sub-contractor management process in relation to financial standing, insurance cover, quality assurance and other accreditation, and where we believe they will bring added value through particular domain and/or technical expertise.

We are very pleased to be partnering with Pythagoras for this tender submission as they bring specific expertise and experience in Microsoft Dynamics CRM, including within Government organisations, as well as current knowledge of TNA's business and technical environment. We believe that our partnership with Pythagoras will offer a seamless service and timely delivery to TNA for this requirement.

2.2 Overview of Pythagoras

Pythagoras Communications is the UK's leading privately held developer and integrator of Customer Relationship Management (CRM) solutions, Member Relationship Systems, Business Analysis solutions, Collaborative working projects and ERP applications, all of which enable individuals to effectively access and use business-critical information spread throughout the organisation.

Founded in 1997, Pythagoras Communications is an independent solution vendor having implemented in excess of 350 CRM systems in the UK and Europe, our impressive client list range from large corporate and public sector organisations to small and medium-sized enterprises.

Pythagoras specialise in building dependable CRM business systems, empowering people, creating ongoing competitive advantage and delivering measurable return on investment across the organisation's operation infrastructure.

Their innovative approach allows Pythagoras to bridge the gap between providing a system that solely meets TNA's technical requirements and one that truly supports and enables cost reduction, maximises income and increases productivity throughout the organisation.

Each project embarked upon is regarded of the highest importance and with their highly professional and experienced implementation teams, following proven methodology such as PRINCE2, they work closely and collaboratively with customers at all stages throughout the delivery process to ensure user adoption, advocacy and that measurable business benefits are achieved.

As one of the UK's premier CRM providers, Pythagoras is among the few implementation experts that operate a fully manned helpdesk and have dedicated training resources available. This ensures that an immediate response to any questions that are raised during or post project and that we can offer the highest level of support to your business now and in the future.

Finally, the key benefit of working with this SciSys/Pythagoras partnership is the reduced operational risk. By working closely with our project teams and utilising our considerable skills and experience, Pythagoras can guarantee to guide your business through a successful CRM implementation, working within set budgets and timescales to keep risk low, investment fixed and success high.

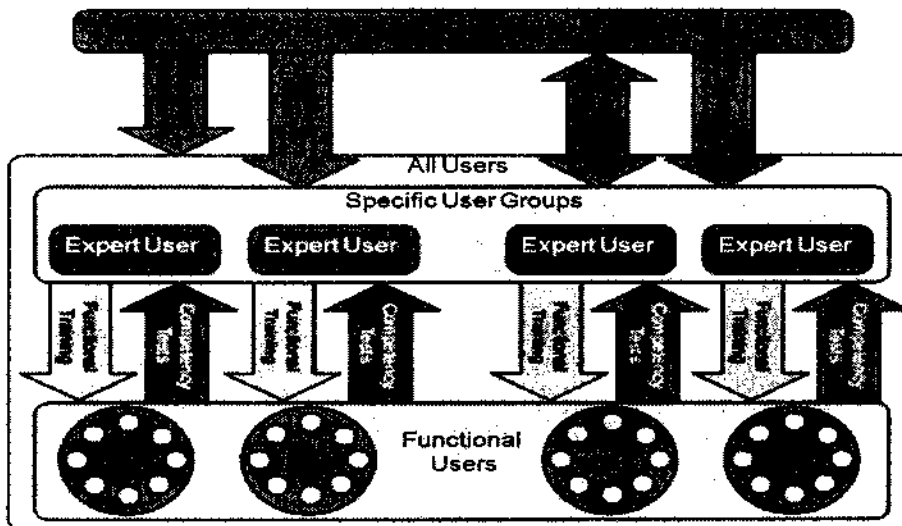
In summary, Pythagoras is an established and proven company, with an excellent track record of working with Government and not-for-profit organisations, with the financial and quality standards that TNA would expect of a partner of SciSys.

6 TRAINING

Pythagoras has a dedicated training division 'PyTraining', geared to make certain that all of your employees are fully equipped to get the most out of using Microsoft Dynamics CRM and ensure that the investment made in integrating with MS CRM is maximised.



Delivery goes a long way beyond having a system signed off against a technical requirements document. Both SciSys and Pythagoras believe a project is incomplete until the customer is actually deriving the expected benefits. This means that the system has been designed to support their business objectives, and that users are taking full advantage of the systems capabilities. We therefore place great emphasis on ownership and training before, during and after implementation.



For the CRM implementation for TNA, we anticipate that the most appropriate training package would be Train-Trainer, as discussed in Section 3.6 – to enable the implementation to be as rapid as possible, but also to disseminate the key processes down to the end user from TNA elite users – keeping the message as relevant as possible and enabling a role based training environment, allowing end users to be confident in their own user tasks rather than learning functionality they won't need to put into practice.

We can offer the following training courses, on site at the TNA or in the Pythagoras offices in Maidenhead and London:

End User	(1 day per user up to 8 delegates)
User Administrator	(2 Day Course up to 4 delegates)
System Administrator	(3 days Course up to 4 delegates)
Train the trainer	(4 day Course up to 5 delegates)
Online Instructor-Led	(series of 2 hour sessions courses – end user)
On screen system coaching	(available at all times/ user discretion)

7 SUPPORT

SciSys and Pythagoras offer a 12-month rolling contract to TNA to provide telephone, email, knowledgebase, case portal management and dial-in assistance to the delivered solution, starting from the go-live phase of the implementation.

Typically this is the time there are the most questions and additional requirements raised and having a partner to manage these first, second and third line queries is vital. The target would be for this support to be absorbed in-house after a period of time due to the ease of self-management the solution offers. However, many partner organisations who work with SciSys and Pythagoras on CRM implementation projects find the partnership provided offers great benefit and experience and is well worth the annual investment.

Full details of the support offered and case management explanations are available within Appendix D.