Request for Proposal (RFP):

The Royal College of Radiologists CRM 2.0 project
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Request for Proposal (RFP) for the Royal College of Radiologists CRM 2.0 project

The Royal College of Radiologists (RCR) is looking to procure the services of a partner to develop and implement the RCR’s MS Dynamics CRM, ensuring that the new system integrates fully into all elements of the RCR’s current technology landscape.

As part of this process the Royal College of Radiologists makes no obligations in any way to:

- Pay any bidder for tender response;
- Award the contract with the lowest or any bidder;
- Accept any tender information received from bidders;
- Include bidders responding to this tender, in any future invitation; or
- Any other commitment to bidders.

By participating in this process, you are indicating your acceptance to be bound by the guidelines set out in this letter.

Please acknowledge via email (ethan_shah@rcr.ac.uk) safe receipt of this document within two working days together with your confirmation of your intention to complete the RFP, including all relevant contact details (names, role, telephone number(s) and email addresses).

I look forward to receiving your response.

Yours sincerely

Anna Marshall
Digital Products Owner
1 Introduction

Scope

1.1 The purpose of this document is to provide prospective bidders with the information they need to put forward a proposal for the development and implementation of a new CRM for the RCR, including elements of the scoping, design, UX and functionality. This document should also provide sufficient information to help inform any prospective companies of the complexities and issues currently facing the RCR.

1.2 Information in this document includes guidance on:
   - The Royal College of Radiologists
   - The current CRM (“CRM 1.0”) and the technological landscape of the College
   - The challenges faced
   - The solutions required
   - How the procurement process will be managed
   - Request for proposal background information questionnaire

1.3 The Supply of this document to any bidder does not imply or guarantee that the recipient will be included in the list of applicants invited to submit a full tender response.

1.4 The request for proposal background information questionnaire can be found in full in Appendix A. For completion by any bidders applying.

2 Overview

The Royal College of Radiologists

2.1 The Royal College of Radiologists (RCR) was founded nearly 50 years ago and is the professional body and membership organisation for clinical radiologists and clinical oncologists. The College works to set the curriculum, train, examine and support qualified doctors to become consultant clinical radiologists and clinical oncologists.

We work with our members and external parties across the medical industry, refining the latest research and guidelines into relevant guidance for radiologists and oncologists.

We can educate and support radiologists throughout their career, providing practical guidance, training, and assessment. Input from our members, professional consultation and mentorship drives the RCR forward.

2.2 Our values:
   - People focus - We treat everyone fairly and with respect.
   - Integrity - We are open, honest, and transparent.
   - Making a difference - We strive for excellence. We make a difference by setting standards and empowering our membership and our staff through personal development and lifelong learning.
   - We recognise that patients’ best interests underpin everything we do.

2.3 This project will start a wider review of current business operations and initiate the re-engineering of the business through a continuous improvement approach, ensuring we are future-proofed with more efficient processes.
2.4 As part of the process the RCR is aligning the customer journey and business processes. CRM 2.0 must support the college’s domestic and global growth plan for at least the next five to ten years.

CRM 2.0 must give an excellent user experience and become a system that our staff are keen to use daily. It must give us access to data to enable us to evaluate performance and provide insights to support internal and external operational and strategic developments.

The current CRM and the RCR’s technological landscape:

2.5 Our current CRM is based on MS Dynamics. It needs to be replaced with “CRM.2.0” as it no longer meets our needs.

2.6 The RCR operates in a Microsoft environment. The current CRM is a heavily customised version of Dynamics 365 CE/Sales, with functional dependencies of proprietary accelerators, integrated with an Umbraco portal, a Drupal website and SagePay/Opayo as our payment gateway. Single sign-on (SSO) and authentication is managed via OpenID and claims data is passed to satellite platforms/website for enhanced access control.

2.7 CRM 2.0 will remain an MS Dynamics platform. So, the RCR can maintain long-term control of the CRM, the required approach will be to rebuild the CRM via a blended hybrid in-house/supplier model and there is to be no use of any closed or proprietary coding or applications.

2.8 The CRM needs to cater to a range of users and stakeholders:
   - Internal stakeholders, e.g. RCR staff
   - External stakeholders, e.g. UK and global clinical oncologists, clinical radiologists, medical undergraduates and trainees and a non-member customer base
   - External stakeholders e.g. organisations

2.9 The new CRM will become the single point of truth for all core data, including managing the RCR’s membership and events processes. It will drive the SSO for the main RCR website and other RCR sites connected to the current SSO solution. It should be noted that the current website will be replaced in November 2023 and the existing site is not indicative of the RCR’s needs or plans.

2.10 At present there is a member portal which is the gateway for external users to access CRM data – this will be replaced by a new member area on the RCR website. The new CRM will need to be fully compatible with all RCR systems, including the exam booking system, the learning platform, and the bulk email system as examples. The aim is to ensure that the CRM will be able to transmit data to all outlying RCR platforms.

2.11 The successful bidder will be required to work closely with our digital agency who are developing our new website and will build our new member area.

3 The Future Opportunity

Looking to the future

3.1 The RCR has further refined the MVP definition to target both the functional need and to support ongoing change to our ways of working. The development of the CRM is based on a set of defined “to be” processes agreed by the RCR and owned by the RCR Digital Products
Owner. The CRM project itself will be facilitated using Agile methodology which is underpinned by using an iterative build approach in sprints, rather defining a detailed and exhaustive list of requirements at the outset.

3.2 We will maintain and add functionality to the CRM in the future. This work will be carried out in combination with:
   a. in-house team of development and configuration specialists (to be recruited)
   b. the initial vendor/supplier
   c. other 3rd party Dynamics developers

Functional overview
The diagram below notes the examples of RCR functional and software requirements. This is not comprehensive and there are elements that are currently not specified, such as products, payments, SSO, registration and Dot Digital which must be considered. It is to be noted that further functionality may need to be agreed as a result of the research and scoping elements of the project that will take place in Phase 1
The RCR is committed to developing an off-the-shelf solution with minimal bespoke development with at least an 80/20 split in favour of off-the-shelf configuration. Only where absolutely necessary is bespoke build agreed with a rationale to support the proposed solution.

The table below indicates the expected out of box and custom build requirements:

<table>
<thead>
<tr>
<th>Out of Box Requirements</th>
<th>Custom Build Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dynamics 365 CRM:</strong></td>
<td>Membership</td>
</tr>
<tr>
<td>• Outlook / Teams integration</td>
<td></td>
</tr>
<tr>
<td>• SharePoint integration</td>
<td></td>
</tr>
<tr>
<td>• Documents CorePack (plug-in)</td>
<td></td>
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</tbody>
</table>
4 The Procurement Process

Approach
4.1 To enable suppliers to understand the full scope of the project, below is a suggested project overview which should form the basis of any tender submitted. The RCR is looking for a CRM partner who will be able to work closely in partnership with the College to achieve the best possible outcome for the future of the College CRM. The RCR anticipates the following:

**Phase 1**: Selection and recruitment of a CRM partner, leading to requirements gathering, design and implementation of a minimum viable product (MVP) for the RCR.

**Phase 2**: Build, test and launch of an MVP.

**Phase 3**: Continuing build, test and launch of subsequent elements of the project; leading to the retirement of the current CRM 1.0.

**Phase 4**: Iterative and continuous improvement.

Timetable

<table>
<thead>
<tr>
<th>Stage</th>
<th>Activity/Milestone</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Issue RFP publicly and to invited agencies</td>
<td>w/c 9 October</td>
</tr>
<tr>
<td>2.</td>
<td>RFP - Online session for clarifications (11:00 – 12:00 GMT)</td>
<td>23 October</td>
</tr>
<tr>
<td>3.</td>
<td>Bidders to complete RFP Deadline for submission of response to RFP is 17:00 GMT on 30 October</td>
<td>9 October – 30 October</td>
</tr>
<tr>
<td>4.</td>
<td>Evaluate responses to RFP</td>
<td>31 October - 10 November</td>
</tr>
<tr>
<td>5.</td>
<td>Supplier outcome confirmation</td>
<td>13 November</td>
</tr>
</tbody>
</table>
Tendering procedure

4.2 Overview

a) Suppliers interested in tendering for this project are required to complete the RFP to provide details about their previous experience relevant skills, technical capability, and background company information.

b) Bidders should address and complete all sections of the RFP, including the questionnaire in Appendix A, and return it to us as a Word document and in PDF format.

c) To assist understanding and allow all suppliers to table questions purely for clarification and understanding, the RCR will be hosting an online session on Monday 23 October, 11am - 12pm BST (GMT+1).

4.3 Evaluation and selection

All tenders received will be evaluated against a set of pre-defined evaluation criteria. Criteria will include:

a. Commercials including competitive pricing and clarity of pricing structure.
b. Service capability and quality.
c. Service delivery experience.
d. Suitability of product offering, demonstrating best fit and alignment with the RCR’s aspirations.
e. Experience and knowledge of technology employed.
f. Culture and ability to work with the Royal College of Radiologists.
g. Ability to follow agile development practices.
h. Innovation and added value.
i. Understanding of all parts of the tender.
j. References.

4.4 Bidders will be invited to interview and to demonstrate their systems to the Project Team. This will include meeting members of the initial configuration and development team, the support/service desk function, and members of the ongoing support configuration/development team. As a result of the interviews, references and demonstrations, a successful supplier will be appointed.

4.5 Briefings for unsuccessful participants

The RCR is willing to offer feedback to suppliers whose proposals are not successful, however we reserve the right to control the format and content of any such briefing, and to limit it in any way we consider appropriate.
Appendix A

Request for proposal background information questionnaire

Part 1: Company information
Please answer the following questions:

1.1. Trading name of company
1.2. Registered name of company
1.3. How long has the company been trading
1.4. Main address for correspondence
1.5. Registered office address if different from above
1.6. Main contact name and job title
1.7. Telephone number and email address
1.8. DUNS number
1.9. Is the company part of a group? If so, please describe the structure and give the names of the superior/parent companies within the group

Part 2: Technical capability
This section aims to allow the RCR to understand a little about the experience of your company and any relevant projects you might have carried out, like the one the College is developing.

Please answer the following questions:

2.

2.1. Do you have experience working with and integrating with Microsoft’s Dynamics 365 CRM system? What is the nature of your affiliation? e.g. partnership, reseller, etc?
2.2. Do you have experience implementing CRM systems within charities or professional bodies operating a membership system Can you provide some examples?
2.3. Have you used your own accelerators within these solutions? And have you been successful with using native CRM functionality?
2.4. In your view, what are the critical factors governing whether the configuration and development is carried out in house (by the customer) or by the supplier? Which have you supported successfully in the past?
2.5. Do you offer a centralised single payment management service (credit/debit cards, direct debt & standing orders) capable of processing live and recurring payments?
2.6. Can you detail any customised functionality within your system or service, i.e. accelerators?
2.7. Are the technology components that underpin your system hosted in the Cloud or are they installed into the customer’s premises?
2.8. Can you provide your standard Service Level Agreement for support and maintenance?
2.9. Do your systems and services remain capable of ongoing bespoke changes as required by the RCR?

Part 3: Security and compliance
Please answer the following questions:

3.

3.1. To what security and compliance standards does your organisation work to? How do you ensure that your systems meet those standards during and after release?
3.2. Do you have processes in place for dealing with information security breaches? If not, how would you manage a breach should it occur?
3.3. Have you experienced any information security breaches with your systems and services over the last three years? Please provide details, including the nature of the breaches, how they were resolved, steps taken to prevent future breaches.
3.4. Are your payment services PCI DSS (Payment Card Industry Data Security Standards v4.0) compliant?
3.5. Are your payment services 3D Secure compliant?
3.6. In relation to GDPR, are your systems able to capture consent for all contacts on your system and do you have a right to be forgotten function within your system?
3.7. How do you ensure that the operation of any system that you configure and develop is documented to ensure that future developments/config can be made efficiently? What is your formal change and release management process? Provide details.
3.8. Do you have disaster recovery plans in place, for both your organisation and for the CRM system once implemented? Please provide details of these.
3.9. Have your systems and services undergone formal audits in the last two years? If so, please provide a summary of the key findings from the audits.

Section 4 – Key Values
Please answer the following questions:

4.

4.1. Does your company have an ethical standards policy? If so, please provide details.
4.2. What are your policies on environmental sustainability?
4.3. Does your company have experience of providing services to other membership organisations? If so, please provide case studies from membership organisations you have worked with and draw attention to the most reported issues and how you have helped resolve them.
4.4. Does your company use subcontractors or external suppliers to provide any part of your service or operation? If so, please provide details, including your vetting process and how you ensure contractors adhere to your standards.
4.5. What is your turnover of staff within your configuration teams, development teams and support teams?