

Request for Quotation

Key Account Management Project

Background

Growth Platform – Liverpool City Region Growth Company

Growth Platform is Liverpool City Region’s economic engine, designed to generate growth and opportunities to support people and businesses of all sizes.

Growth Platform works with business and with partners to develop and deliver services that genuinely work, linking opportunities created by local growth, inward investment, our sector strengths, our visitor economy and our graduates and young people, to make sure that the right services are in place at the right time.

www.growthplatform.org/

Requirement

Liverpool City Region (LCR) is seeking to appoint a suitably qualified and experienced consultant for a period of time to be determined for the following activities:

1. Inward Investment Key Account Management activities
 - Targeting specific industry sectors
 - Targeting specific Geographical areas
 - Developing and managing a pipeline of opportunities
2. Developing qualified prospects in the LCR
3. Sector based market intelligence
4. Account Management and reporting

Primary targets are companies in our key sectors who have established operations in our region. Examples of the type of operations we would be looking for are, sectors to be determined eg Ad Man, HLS, Energy etc

It is expected that contacts will be at Chief Operating Officer Level.

Contract Outcome:

The desired outcomes of this activity is to identify existing operations, foreign owned that generate qualified and realistic opportunities for investment within a time period, this means companies that have plans for UK expansions in the next 1 to 3 years are the key performance indicators.

Specific Outcomes:

Metric	Goal
Qualified company contacts	A minimum of 30

1. Inward Investment KAM

The primary focus of this requirement is to build a pipeline of qualified leads of potential investor projects in the LCR. By this we mean companies that have plans for UK expansions in the next 1 to 3 years in the following priority sectors:

- Manufacturing and engineering – including associated sub sectors
- Energy including renewables, offshore wind and supply chain companies for the sector
- Life Sciences
- Logistics and transport

The consultant is expected to:

- Identify prospects through research, local intelligence using local networks, local trade and business support organisations
- Engage with in country multipliers such as DIT
- Develop a pipeline of leads
- Set up meetings, including video conference calls etc

2. Sector Based Market intelligence

The objective is to ensure the best use of resources and to identify the best prospects and industry sectors.

To support the work for both the LCR Inward Investment Team and the consultant to ensure the best use of resources and value for money the consultant will be required to provide reports on market intelligence.

Market intelligence requirements include:

- Key sector information examples include, size of sector, growth potential, major players
- Trend data – sectors which are up and coming/diversifying
- Sectors experiencing challenges that the LCR may be able to resolve

3. Account Management and reporting

Account Management – Leads

It is expected that the appointed consultant share reports for input onto the LCR CRM system to record all contact with potential investors and adhere to all data protection requirements.

For client meetings with members of the LCR Inward Investment Team the consultant should provide details including:

- Contact information for the meeting including details of Linked In profiles
- Meeting Logistics (Note times should be UK times)
- Company summary information including size and business description
- Details of the project opportunity including timescale, type and size of investment and number of jobs planned
- Any incidental information the consultant deems appropriate to support the LCR meeting.

Account Management – LCR

Key to the success of this activity is the development and maintenance of excellent working relationships with the whole LCR Inward Investment Team.

Reporting

A monthly report will be required evidencing activity of the previous month. This should include details of progress against targets and performance. It should also propose feedback on unsuccessful projects.

Definitions and Qualifications:

What is a project?

To ensure the consultant and LCR contact the right prospects the following criteria should be used to filter potential opportunities.

- Companies must have operations currently in the Liverpool City Region
- Companies must be foreign owned or part thereof according to DIT Playbook
- Engagement must be with decision makers.

The definition of Investment ready is:

- A company that has or is developing a plan for expansion
- The company operates in one of the Key sectors identified as priorities for the LCR
- The timescale for the investment is within the next 24 months
- The number of jobs to be created in the next 3 years
- The company has agreed to a meeting with the KAM and or consultant.

Support from LCR:

The LCR team will help and assist the consultant in preparing for meetings by:

- Provide current KAM company lists and other collateral
- Identify key questions to clarify the opportunity
- Helping to identify and overcome objections
- Providing additional information following discussions.

Deliverable Timescale

What are the time scales for the project – start & end dates

1/12/2021 to 31/3/2022

Indicative Budget

£20,000

Evaluation Criteria

Quotations will be assessed and scored on the following criteria:

Quality/ Technical Merit (50%)

Supplier must demonstrate they have the technical and professional capability to deliver the requirement.

Delivery Timescale (20%)

Supplier must demonstrate they can deliver the requirement to timescales above.

Cost/Value for money (30%)

Does supplier offer value for money. This will not necessarily be the cheapest quote.

Scoring Methodology

4 Excellent	Proposal meets and in some places, exceeds the required standard
3 Good	Proposal meets required standard
2 Acceptable	Proposal meets the required standard in most respects, but is lacking or inconsistent in others
1 Poor	Proposal falls short of expected standard
0 Unacceptable	Completely or significantly fails to meet required standard or does not provide the relevant answer

Proposal Format

Proposals should clearly demonstrate how they meet the requirement set out above.

Deadline and Submission

Proposals are required by **26/11/2021 5pm** either electronically or by post/in person to Alice Lamb, Head of Investment Services alice.lamb@growthplatform.org address No 1 Mann Island, Liverpool L3 1BP.

Conditions of Tender

- Please be aware that due to the relatively low indicative budget for this work (i.e. less than the current OJEU limits) there is no regulatory obligation for us to provide feedback if you are unsuccessful.
- We reserve the right to discontinue this tender process at any time and not award a contract.
- You will not be entitled to claim from us any costs or expenses which you may incur in preparing and/or submitting your Tender at any stage of this exercises. This applies whether or not your organisation is successful.