



## Request for Quotation

### Consultation for the Implementation of CRM/ERP/Project Management Software

#### Background

Aluserv Ltd are an aluminium fabrication company. We manufacture aluminium windows, doors, curtain walling and roofs. We have been trading since Jul 2012 and have over 40 years experience in the industry.

We are based on the Wirral and work closely with main contractors and home owners to provide them with the very best in windows and doors.

For future growth Aluserv are looking at ways to improve our digital input on our manufacturing processes. We currently have manual systems in place (excel spreadsheets, hand written instructions etc) and we are looking at introducing a paper-free environment to our workplace.

#### Requirement

We are looking for a consultant to work with us on the implementation and onboarding of a CRM/ERP/Project Management system. Key requirements for the system build:

- Capture the initial enquiry, recording the client details, source etc
- Key information – details of enquiry, site address, no of windows, doors, styles, system houses etc
- What building stage is the enquiry at? Is it a tender – then we will need one route on the crm or is it a contract that has already been awarded we would need a different route on the crm
- Once the lead is qualified we need to create the sales opportunity (pre-set questions listed so we do not miss any essential information
- The quote will then be produced – we currently use an industry standard software to do this – if it can be integrated that would be great, if not, we would need a way of storing this information in the new system
- Once the quote progresses to a “JOB” we need all of the information automatically transferred on to the project management system – this would include drawings, material analysis sheets, fabrication/cutting sheets etc (all taken from the Logikal software)
- Automated workflows, progressing the job from one department to another whilst recording all relevant data – creating tasks to check what stock is currently held,

what stock to order and tracking all of these orders so that any changes in delivery dates will automatically update the relevant people

- A way of noting any issues with materials or accessories upon delivery/checking in to stock and notifying the relevant department/person via an automated email/alert
- A way of noting any issues from the shop floor – any mistakes made that require any re-ordering of materials and/or accessories and tracking replacement orders and delivery times
- Once window/door etc is manufactured it needs to be quality checked and logged and then paperwork produced for delivery or fitting
- Sign off sheets for fitting/delivery
- A reminder service for key dates ie. snags, end of initial warranty period
- A way of recording hours worked on a project against allocated hours for said project
- A place where all communication from a client is stored in one place and also attached to the specific job so you can search by either client or project
- A way of reporting on all parts of the process
- Data migration for clients and suppliers from current accounts software in to new system – not the financial information

#### **Deliverable Timescale**

Work to be completed by 31.05.2023.

#### **Indicative Budget**

£8,000

#### **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 **2<sup>nd</sup> April 2023** electronically to Jackie Gillam, [jackie@aluserv.co.uk](mailto:jackie@aluserv.co.uk)

### **Date Published**

22<sup>nd</sup> March 2023

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### **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.