



Request for Proposal

For a digital development partner to work with Be the Business on our mission to help UK SMEs identify, understand and take action towards solving their business productivity challenges.

30th September 2021

Be the Business

5th Floor

26-28 Glasshouse Yard

London

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Overview

We are looking for a digital development partner to help us in our mission to help every firm in the country improve their performance. We will work closely with them on a range of different pieces of work, operating as one team.

The following pages aim to give you context on our work, the projects we expect to undertake, and provide you with all the information you need in order to respond with a proposal, so that we might understand whether you could be a good fit to work with us.

We welcome any questions you have, and look forward to discussing your proposal further.

Tom Gibson
Head of Digital and Tech Adoption Programmes
Be The Business

Confidentiality Statement

The applicant will not disclose, divulge or impart to any third party, other than those designated in writing by Be the Business, any Information.

The applicant will not use any Information, in whole or in part, for any purpose other than preparing and submitting the RFP unless agreed beforehand, in writing, by Be the Business.

The applicant will only disclose Information to those of its employees and contractors as may be necessary to prepare and submit the RFP and will ensure that those employees and contractors comply with the terms of this confidentiality statement.

This duty of confidentiality will not extend to any Information to the extent that such Information at the time of receipt by the applicant was in the public domain; or after receipt by the applicant was made public by a third party acting without impropriety in so doing; or was in its possession before receipt from Be the Business and was acquired directly or indirectly from a source wholly independent of Be the Business, and the applicant can establish this by competent proof; or is required by law to be disclosed, provided that the applicant notifies Be the Business of such requirement as soon as reasonably possible after becoming aware of the same.

The provisions of this section will survive the RFP expiration or earlier termination of this RFP and continue to apply for a period of ten (10) years from the date of such expiration or earlier termination.

Terms and Conditions of this Proposal

In managing this procurement, the Buyer will endeavour to act fairly and reasonably in all its dealings with interested suppliers and Respondents, and to follow due process which is open and transparent.

This RFP does not commit Be the Business to award a contract or to pay any costs incurred in the preparations or submission of proposals, or costs incurred in making necessary studies for the preparation thereof or to procure or contract for services or supplies.

Be the Business reserve the right to cancel the RFP and any or all proposals may be rejected as a result.

Following submission of the proposals and their final evaluation, Be the Business reserves the right to retain unsuccessful proposals. It is the responsibility of the Vendor to identify any information of a confidential or proprietary nature contained in its proposal so that it may be handled accordingly.

Please make clear when giving any financial values whether it includes VAT or not. We would prefer that any monetary values are given free of VAT and VAT calculated separately.

If you have any questions or concerns about this proposal, please notify the Be the Business contacts outlined in Section 6 of this document.

Where no notice is given, all information contained herein is copyright 2021 Be the Business.

Section 1 - Introduction

Who are Be The Business?

Be the Business is a not-for-profit organisation with a mission to help every firm in the country improve their performance. We work with the entire business community to explore, define and share what works, with every company that wants to learn and improve.

Launched in 2017, Be the Business receives funding and support from the UK government and some of Britain's leading companies.

Our primary audience is the UK's SME community, and we design and deliver a number of programmes to support these businesses.

We also work with the business support ecosystem - those organisations who provide support and services to the UK's SME community, to help them understand the needs of the community, and rapidly implement effective programmes at scale.

Why do we exist?

SMEs in the UK were facing significant challenges even before COVID-19, with stagnant productivity, poor management practices, and low rates of technology adoption.

Interest in and demand for business support services is low - and even when a business decides to actively invest in business improvement, they can struggle to find quality and impartial advice and services, and to know what questions to ask or where to get started.

The business support ecosystem can be hard to understand. It is made up of a large number of mostly unconnected services which vary in quality. Support can be hard to find, there is no single entry point, and there are few clear pathways between different elements of support.

Be the Business exists as an impartial provider to help address this need. One of the ways we are doing so is through a digital platform with frameworks and content which inspire and enable small businesses to understand the right things to focus on, find and access good support, take action, and make ongoing journeys of improvement.

What do we do and how do we help?

We innovate to drive improvements in business support services - we pilot new and effective ways to support the needs of UK SMEs rooted in insight and evidence, and then scale those programmes via partners.

These programmes include our Advisory Boards programme, which offers SME leaders access to non-executive style support from a board of other business people; Mentoring for Growth, a mentoring scheme which pairs SME leaders with mentors from some of the UK's leading firms; and our digital platform (<https://www.bethebusiness.com>) which offers scalable support to business leaders looking to improve in the form of guides, tools and templates, action plans, case studies, and a variety of other digital tools.

Our primary objective is to help businesses make positive changes that lead to positive impacts on their business, and ultimately benefit the economy of the UK at large.

Yet our ability to do so on our own will always be limited. Partnership with private and public sector organisations has always been at the heart of what Be the Business does and we are developing a digital offering which allows us to reach greater scale and achieve greater impact by working with and through partners.

Section 2 - Digital Platforms

What is the role of our Digital Platform?

Our digital strategy is to create a more effective ecosystem for business recovery and improvement, encouraging and enabling businesses to take ongoing actions to improve their performance.

We will deliver on this strategy in part by putting our digital platform and its associated digital products and content in the hands of our partners, allowing them to offer our services to their SME audience, helping us to deliver greater reach and impact.

So - our digital platform intends to provide both a centralised destination for businesses looking for support and resources and programmes, as well as provide underlying functionality and infrastructure which can allow our partners to run deliver our programmes and content to their customers in a consistent and effective way. Eventually it could act as an insight, analytics and effectiveness platform that any provider could use to track the progress and impact of business improvement actions.

Digital Platforms: Objectives & Outcomes

The ultimate objective of our work is to support the recovery and growth of the UK's SMEs.

We do this by encouraging firms to change their behaviour, both through the content and services which our platform delivers itself, such as case studies and interactive tools, and content and services delivered by others to which it signposts users.

Our current focus intends to put in place infrastructure which can enable our platform to do this at much greater scale by working through partners with significant reach into the SME market, and more impactfully by positioning our assets alongside trusted brands and services.

This work is also a critical part of Be the Business's commercial strategy, with revenue from licensing our platform and its assets helping the organisation sustain itself and continue to support small businesses.

This means our measures of performance will fall across a number of different areas:

Reach – Our approach solution must allow partners to easily deploy our platform and its assets with their own users, allowing us to benefit from the significant reach that many of these organisations have with our target audience.

Impact – Our approach must drive impact for its users, surfacing our assets and content in such a way that they are able to deliver the purpose for which they were designed. It should provide

users with understanding of key concepts, engage them over time, encourage and support them to take action, and help them track their progress.

Value – Our approach must be of sufficient quality to justify ongoing payment from the partners who make use of it. It should provide their users with an excellent user experience and be straightforward for their technical teams to integrate into their existing offerings.

Insight – Our approach should support our central data model with data on users and their activity on our platform captured to allow analysis and insight generation.

In the longer term it is worth noting that Be the Business conducts formal evaluations of its initiatives and this eventual evaluation will look at how the performance and productivity of firms who have been reached by the intervention has changed.

As changes in performance and productivity can take a long time to manifest, we also look at key drivers of performance and productivity to assess whether the intervention is having the desired impact. The two key drivers we look at are the extent to which firms adopt proven management practices, and the extent to which they adopt proven technology, allowing us to measure impact and outcomes, i.e.:

Outcomes for engaged businesses (to be measured through formal evaluation)

- Productivity
- Rate of successful technology adoption
- Rate of adoption of proven management practices

Section 3 - This RFP

What is the purpose of this RFP?

We are looking for a digital partner who can help support us in continuing to develop our platform. We are a small team internally, and require additional resources and capabilities which we can call upon to accelerate and deliver our work.

We are turning to the open market to look for a partner who will work alongside our digital platform team to work on a number of projects, large and small, over the course of an 18 month period.

What type of work might you need to deliver?

Our partner will help us develop a range of outputs, ranging in their size and complexity, but all with the aim of developing the platforms' functional capabilities and impact, for example:

- Service Prototypes - defining and developing small prototypes for new services on the platform, e.g., a technology services marketplace which lists offers available to SMEs from approved suppliers for a given technology
- Integrations - creating integrations with external partners or platforms for enhanced user journeys and data sharing, e.g., integration of a new external service to facilitate our Advisory Boards programme
- Service Development - larger scale projects to develop core functionality for the platform, e.g., development of a co-branded version of our platform for use by partners . We have included additional detail on this example of this below, which we'd like you to consider within your response.
- Campaign Activity Support - rapidly developing functionality and features for a campaign, e.g., a landing page which requires data capture for leads interested in our programmes or activities, storing their data in our systems.
- Functional Requirements / Technical Scopes - working with us to explore and define technical approaches, functional requirements, specifications, etc., for our platform.
- Administrative tasks - smaller technical changes, update and fixes where relevant.

As these deliverables vary in their size, complexity and nature - we'd need you to approach your work with us in an agile way, potentially with multiple projects concurrently. Please provide your approach to working in this way within your response

We're primarily looking for a technology partner, but it may be beneficial if you have additional capabilities within your team, i.e. project management, design, UX, etc. Please provide details on your capabilities within your response.

A current priority project, which we would like support on immediately, is our “Co-branding” project. We’ve outlined this in more detail below and would like you to share your perspectives on this project as part of your response.

How do we want to work with this partner?

As our needs are constantly evolving and we're relatively agile in how we work, we're looking for a relationship rather than a set of deliverables against a scope, and looking for a partner who are happy to work with us on tackling our backlog, and act as an extension of our internal team.

The successful partner will:

- **Operate as a partner who can support us in developing this platform** - we want to work closely with a business who are more than just a supplier, but who can help us develop something which can form a part of our core offering. We will act as Product Owner and a deeply involved partner in the process - this is collaboration, not outsourcing.
- **Design and develop features, functionality and experiences** - at the core of our partnership is your role in creating the technology which delivers the capabilities we require, building upon our existing infrastructure wherever possible, but we're also looking for a partner with a point of view who can help us explore the 'how' not just developing to a spec.
- **Manage the process in a transparent, agile and collaborative way** - we want to combine structure and flexibility, and believe an agile process is the most effective way of doing so. We need to be responsive to changes, and need a partner who understand that priorities change over time.
- **Ensure our investment represents value for money** - we are a charity, and we are using public funds to develop services, so any proposal needs to ensure value for money and be outcome focused.
- **Support us to develop our internal capabilities** - over time, we want to grow our internal team and build a stronger capability to manage and deliver projects like this internally, and be equipped to support the platform ourselves, so your help to show us how we can work better with agencies and with internal and external talent, will also be valued.

As our the scope of work here is not based upon deliverables, but rather your time - we'd want to agree a rate card based upon ongoing resource committed to our business, rather than specific outputs. Please provide details on your ways of working, day rates and proposed team structure within your response.

Section 4 – Details of our “Co-branding” project

Whilst we want to find a partner who can support us on various requirements, we do have a number of key identified projects we will want to work with you on within the next 6 months.

We are sharing details of one such project for you to provide your point of view on how you'd help us deliver such a project. Please review the project outline below and provide your response to our needs within your response.

As outlined in our strategy, Be The Business aims to deliver impact at scale through partnerships and by enabling third party organisations to deliver our content, assets, and programmes themselves. One of the ways in which we might do this is through “co-branding” our digital programmes and services.

We are exploring how we can do this for our core content and programmes, and have a number of existing partners who are already committed to delivering our services directly to their audience of UK SMEs.

We have already built the digital experiences which these customers are wanting to replicate, but we do not have a repeatable process for implementing multiple 'instances' of these services where the customer can include their own branding and tailor the experience to their audiences needs.

To date we have considered four technical approaches, to balance cost of implementation, speed of implementation, and our ability to track end users' usage of the content and tools.

We have laid out these example approaches below, please review these and within your response or our RFP explain:

- How would you approach this project? How would you kick off the process, help us define the requirements, and plan, cost and deliver the work?
- Which approaches we've suggested below do you feel makes the most sense, and why? Explain your rationale and the pros and cons of the approach, and any relevant experience you have of undertaking similar work

Technical Approaches

Approach 1: FORKED INSTANCES

We version and tag our current code base, and provide it 'as-is' containing content and code, for or for us to spin up duplicate instances or others to implement wholly on their own infrastructure. We can maintain the codebase using version control, and provide 'critical updates' where

required, but effectively, this is a zero-update / one-off delivery, which can be tailored post install to customise the content and branding available. This is the quickest approach, but we recognise is not sustainable and will lead to longer-term challenges.

Approach 2: EMBEDDABLES

We revise our current code base to allow 'fractional' aspects of our content and services to be provided to third-party sites, e.g., dropping a javascript tag on a page, and content loading in to a defined HTML element. This allows us to manage content, track usage, and provide minor tailoring. These embeddable could be either an individual piece of content, served as JSON to the end customer client for rendering, or HTML to provide a pre-rendered layout, or an end to end customer journey within a "widget". These embeddable would be licensable, so only authorised domains/clients can use them, and also tailored, and provide queryable functionality, i.e. calling the embed with a query to provide the correct content/experience. This approach could also be used to run "advertising style" display-units, which embeds our functionality/content/experience on any website at scale via programmatic display platforms. The available embeddables grow over time.

Approach 3: BTB HOSTED SAAS APPLICATION

We revise our current code base to allow multiple clients to run the same application, but with their own branding and light customisation of content, hosted on our infrastructure. We manage the application wholly. Clients can point a domain at our application (e.g., productivity.clientdomain.com) and get a fully co-branded and tailored experience for their customers. For full experiences, their end-customers are required to create a 'BTB' accounts, but we can provide an SSO approach if the client enables authentication against any sort of existing user account. There are a number of 'modules' available, i.e. diagnostic, improvement, mentoring, content, search, etc. which the customer can subscribe for access too, and these grow over time.

Approach 4: HEADLESS API

We revise our current code base to utilised public APIs which can be exposed to customers. Customers are then able to access our content APIs, as well as reporting views / actions via our actions API. This provides a 'headless' service which allows our customers to provide content and functionality to their customers in whatever way they wish, but requires them to create their own 'front-end'. BTB uses our own APIs to provision our own branded versions of the service. APIs can be used for non BTB services too, ie. user actions for non BTB programmes. The API would grow over time, but require versioning for legacy customers who are no longer intending to update their instance functionally.

Section 5 - Your Response

What do we want you to provide in your RFP?

As we do not have a defined scope for you to cost, we would like you to provide details on how you would approach this relationship with us, as well as your approach to the specific project we outlined above.

Your response must enable us to understand your business, your experience, your capabilities, your approach, and your cost structure.

Your response should be provided as answers to the series of questions below.

Please follow the structure as provided (although we encourage you to cross-reference wherever relevant), and provide links to references and external resources if required.

Please limit the length of your response to 20 slides or 15 pages of text.

Company overview

Introduce us to your organisation. Please include:

- What makes your organisation a good partner for Be the Business?
- What examples would you give of your relevant experience, and how you have worked with clients with similar needs in the past?
- What experience do you have working with public or charitable organisations, and delivering products for similar audiences and to similar standards?
- Any references or testimonials you can share from recent projects with similar ways of working?
- Where are you based, and how does your team operate (i.e. remote, on-site, how would you work with us?)
- Do you have any D&I policies in place, what are they, and how do you currently measure against your targets?

Approach and ways of working

Describe the approach you would take to a partnership with us. Please include:

- What methodology you will follow, how would you structure and manage work required, and why you have selected this approach?
- How do you manage variable requirements and capabilities for different tasks?
- How do you communicate and collaborate with partners?

- How might you help us develop our internal capabilities over the length of the relationship?

Team and relevant experience

Describe the resourcing approach you will take for the project. Please include:

- What is the team structure you would recommend and why you have selected this approach?
- What are some of the biographies of the proposed team members including relevant experience and key skills?
- What technology stacks and platforms do you have experience in and prefer developing for, and why?
- How would you scale your team / capabilities if we have short-term additional needs / requirements?

Fees and value for money

Outline your fees and how these represent value for money. Please include:

- What are your proposed rate cards for the team you have recommended?
- How will you help us ensure value for money?

Response to “Co-branding” Project

Based upon the outline of our “co-branding” project:

- How would you approach this project? How would you kick off the process, help us define the requirements, and plan, cost and deliver the work?
- Which approaches we've suggested below do you feel makes the most sense, and why? Explain your rationale and the pros and cons of the approach, and any relevant experience you have of undertaking similar work

Section 6 - Contract, Response Timings and Process

Contract Duration

We are looking for a long term relationship with a strategic partner. We would like to hear your approach for how you would like to work with us as part of your response. We are assuming we would enter into an 18 month relationship, with particular pieces of work taking place within this overall agreement. Please note that as a result of the way in which Be the Business receives its funding from government we would need to enter into an arrangement covering the current financial year with the intention to extend once our next tranche of funding is unlocked.

RFP Agenda

Date	Event
30 th September	RFP Published and released to market
4 th – 7 th October	Availability for chemistry and Q&A sessions between bidders and Be the Business
8 th October	All answers to questions received shared with all bidders
20 th October at 12:00	Response deadline
26 th October	Selection of shortlisted applications and notification of applicants
28 th / 29 th October	Meetings with shortlisted applicants
1 st November	Selection of preferred supplier and start of contracting process
15 th November	Kickoff of first pieces of work

Submission Deadlines

All responses must be received by 12:00 on 20th October

Submission Delivery Details

All submissions for responding to this request should be submitted by email to tom.gibson@bethebusiness.com.

All electronic submissions must be in Portable Document Format (PDF).

Shortlisted bidders will be asked to present their approach on the 28th or 29th October by video conference. Forty five minutes will be allocated for each bidder, with five minutes for a short presentation followed by questions and discussion.

Submission Questions and Clarifications

You may contact the following people if you have any questions or require clarification on any topics covered in this document before the deadline on Thursday 7th October at 17:00. Questions and responses will be collated and shared with all bidders on Friday 8th October.

Contact 1

Tom Gibson
Head of Digital and Technology Adoption Programmes
Email: tom.gibson@bethebusiness.com
Tel: 07810 458 293

Contact 2

Helen Wright
Chief Finance Officer
Email: helen.wright@bethebusiness.com
Tel: 07425 329 484

Examples/References/Testimonials

Be the Business requires that you provide suitable references and testimonials from previous clients where you have conducted previous projects on a similar or greater scale (we will not limit the number but please submit at least one).

To be included with the above request, please include links to examples which we can access to see examples of your work.

Financial Credentials

The Vendor must be able to make available appropriate financial evidence in order to ascertain the financial stability and capability for taking on the scale and duration of this project.