



Request for Quotation: **Lantoom Quarry – Integrated Order processing, Accounts and CRM solution**

About Lantoom Quarry

Lantoom Quarry Company was formed as a family partnership in 1964 and was incorporated in 2002.

The quarry supplies stone and stone related products to public and trade customers. Lantoom is an active quarry from which various stone products are produced. These are mostly walling stone and aggregates. There are 20-30 distinct product lines.

The majority of products are standardised and graded e.g. cut walling stone which is taken from the quarry and sawn on its bed to create a block suitable for building houses, however some bespoke orders of quarry materials are undertaken.

Lantoom also supplies a range of around 100 bought in products from other local quarries as well as quarries abroad. Lead times for the latter can be up to 12 weeks so a stock of more popular lines are kept at the quarry. The main externally sourced products are paving, lintels and setts which come in various colours and sizes.

Background

One of the largest challenges for Lantoom is to predict demand ahead of time to ensure orders can be fulfilled by having sufficient products ready for sale whilst not overstocking.

Quotations are provided for both new and existing customers and these usually include delivery. A typical customer may, for example, want 3 packs of a specific stock type of paving including delivery. However, on occasion, a customer may want something bespoke which, if they decide to purchase, then need to be produced and/or finished by a supplier. Most requests for quotations come over the phone with some via email or customers that walk-in.

Product pricing of standard lines can vary between customer. A trade customer purchasing large volumes is likely to get a lower unit price than a new private customer. Therefore, a way of holding product discounts (maybe even in an umbrella discount structure) is important.

Currently, Lantoom utilise an on-premise IT solution which is based primarily around Sage Line 50 for accounts. In addition to this, a range of Excel spreadsheets are used for reporting and data analysis.

Requirement

The Lantoom Quarry Management Team is seeking a formal costed quotation, along with a proposed delivery plan, of the types of services that you might be able to supply matching the brief detailed below for an integrated order processing, stock control and accounts IT solution.



The Solution

Lantoom Quarry is looking to gain a number of business efficiencies by implementing a suitable IT solution (or integrated solutions) to support their ordering, stock management, accounts and customer relationship processes.

In addition, there are requirements for supplementary systems such as payroll, a simple DAM (Digital Asset Management system for their stock of digital media as associated with their website), and to cater for integration with their in-house email/calendaring solution (Thunderbird) and telephone system (to enable screen pop-ups and click-to-dial functionality).

Any candidate system must be able to provide:

- A complete end-to-end solution from leads, opportunities to customer order, all supply chain processing, production including staff time and materials and purchase ordering through to the resulting sales invoice(s) and any post sales issues.
- The inclusion of a feature rich accounting system or to tightly integrate with the current Sage Line 50 systems or a market leading product.
- The inclusion or tight integration of a modern payroll system with support for workplace pensions, holiday authorisation as well as standard payroll functions and a yearly update of thresholds and any legislative changes. If no payroll functions are either within or can be integrated with the proposed system, a method should be included within any response of how payroll costs can be appropriately accounted for within the project costing and accounting elements of the system.
- Ability to integrate with the company's telephony platform. This is a VoIP solution hosted on a Fritzbox multi-function router. Sip trunks are provided by Sipgate.
- Support for barcode scanning for goods in and stores management
- The ability to set multiple security profiles for different staff levels to allow read and update privileges.
- An intuitive interface where different modules/areas of the system have a similar look and feel. The system needs to be configured to provide easy and intuitive access to each different type of User.
- The ability to create reports in house by suitably trained staff avoiding the mandatory need for specialist or professional services to producing specific reports.

In addition, some of the specific pre-requisites are described in more detail below:

CRM System

The primary purpose of the Customer Relationship management system is to provide a central repository for all stakeholder information; i.e. Trade and Private Customers, Prospects, Suppliers, etc. This same data must be used within the order-processing and accounting system.

Email integration/communication history

The system should also maintain all communication history with each Contact in terms of emails, telephone calls and notes. An effective integration between Thunderbird and the proposed CRM system would be desirable where inbound emails when viewed in Thunderbird and automatically



search for a corresponding Contact in the CRM system allowing the User to assign the email to the communications history of that Contact. Furthermore, outbound emails should be similarly assignable or synchronised to both the relevant contact and held in both Thunderbird and the CRM system.

Workflows

Workflows should be configured within the system to alert relevant users and management where orders are running behind or where they are predicted to be. Indeed, workflows should be deployed to assist with the overall management of the business by sending alerts where appropriate. Workflow actions can take on different functions where some may be to send an alert email under certain conditions; and others may be to set a task to be completed within a set timeframe or to set a calendar appointment.

Marketing Campaigns

It should be possible to run a communications campaign from the CRM system. This would mean using tools to select a group of stakeholders to use within an email campaign. Integration with third party direct email utilities (e.g. MailChimp) is permissible however, the ease of use of the system must not be compromised if at all possible.

It is desirable to be able to produce complex HTML emails with measurable calls to action within the body of the email to be able to assess interest as well as opens, unsubscribes and bounces.

Reporting

The CRM should provide a report writing facility so that, after appropriate training, specifically defined reports can be crafted by Lantoom Quarry administrative staff.

For reports that constitute key performance information, there should ideally be a feature to convert the report into a dashboard so that targets can be easily review graphically/pictorially.

Below is an itemised list of system requirements:

1. Quotation => Order-processing with Stock management

- 1.1. Produce Quotations with unique (and searchable) reference
- 1.2. Quotations to consist mainly of stock items and include specific text information, e.g. delivery details
- 1.3. Able to email quotations direct from system to address held for customer
- 1.4. Product pricing by customer by product type
- 1.5. Hold multiple delivery addresses (which can be different per order)
- 1.6. Hold Sales Order history by customer
- 1.7. Storage planning and physical stock locations
- 1.8. Live Stock Control (using GTIN numbers) separating Quarry Stock in and Distribution stock
- 1.9. Integrate with future barcode system for tracking stocks
- 1.10. Integrated with haulage supplier databases (referencing GTIN numbers)
- 1.11. Haulage Status with Delivery tracking
- 1.12. Manage stock lead times (e.g. overseas suppliers – up to 12 weeks)
- 1.13. Ordering system – over credit limit/ordering control
- 1.14. Production Management
 - 1.14.1. Display orders to quarry staff
 - 1.14.2. Communicate Purchase orders to suppliers
 - 1.14.3. Analysis of production time vs Resource vs Cost per product
 - 1.14.4. Production staff/labour costs per product
 - 1.14.5. Integrated with Payroll and accounts

2. Accounting

- 2.1. Either an integral accounting system or to integrate with the existing Sage Line 50 on-premise system
- 2.2. Turnover details by customer by product type
- 2.3. Matching delivery notes, invoices and conveyancing notes for customers. Same for
- 2.4. suppliers.
- 2.5. Credit Control
- 2.6. Invoice Integration
- 2.7. Automatic invoice generation from quotation and emailing (similar to quotations as above)
- 2.8. Method of auditing data – system for identifying entry errors
- 2.9. Match turnover to costs – show margins on different operations by apportioning direct
- 2.10. costs.
- 2.11. Payroll
- 2.12. Banking integration

3. Customer Relationship Management

- 3.1. Integration with Thunderbird email client
- 3.2. Client organisation structures and categorise customers (CRM approach)
- 3.3. Identify links between Contractor (e.g. Trade customer) and Consumer

- 3.4. Email Marketing Lists
- 3.5. Integrated with Mail Chimp or other similar software
- 3.6. Capture customer email addresses
- 3.7. Calendar integration, link in with follow ups to clients. To show haulage booked as well
- 3.8. Pro Active Response pop ups to chase quotes and send samples
- 3.9. Pro Active Search to follow up with clients
- 3.10. Value current enquiries in sales hopper, at each stage.
- 3.11. Cumulative picture of number and value of enquiries by hour/day/week etc.

4. Reporting and Dashboards

- 4.1. Replicate standard stock reports (valuation, re-order etc.)
- 4.2. Labour costs per product
- 4.3. Live dashboards
- 4.4. Popular products
- 4.5. Popular delivery to geographic locations
- 4.6. Gross profit margin by product by customer
- 4.7. Seasonal trends
- 4.8. Buyer trends
- 4.9. Conversions – quotes to business.
- 4.10. New customers versus return clients
- 4.11. Re Order Rates
- 4.12. Reporting on Quality assurance
 - 4.12.1. how quickly are emails responded to
 - 4.12.2. how long does it take to provide a quotation from a request
 - 4.12.3. how many inbound links are received to web pages
 - 4.12.4. how often are products out of stock
 - 4.12.5. average order to delivery times

5. Website and Integrations

- 5.1. Integrated with ecommerce website(s) Magento
- 5.2. Customer Satisfaction tracking – link to trustpilot
- 5.3. Inform SEO
- 5.4. Social Media management tools to maintain and collect customer communication
- 5.5. Telephony integration to show calls to clients, provide screen-pop and click-to-dial functionality
- 5.6. Simple DAM solution with searchable media database catalogued and integrated with website

There should be a provision for training for the proposed solution(s). This should include initial (ready for go-live) training and a provision for further training within 3 months of go-live to cater for any specific requirements or issues. This could be more formal training or a workshop.

The costing for the proposed system should incorporate system support and updates for the first 3 years. An agreed approach to system documentation should also be catered for (whether within the proposed system or a collaboration between the supplier and staff at Lantoom Quarry).



European Union
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Respondents should include a time allocation to review selected data from Lantoom Quarry's existing Sage systems to assess what can be imported into the proposed Accounts/CRM system in order to seed its operation.



Summary

Lantoom Quarry invites quotes from suitably experienced organisations with abilities and a proven track record in delivering robust and efficient order processing, accounting and CRM solutions. The successful organisation will work in partnership with the in-house management team to implement the chosen solution.

Deliverer Profile

The supplier will need to demonstrate:

- An ability to work with Lantoom Quarry to ensure the development of accurate briefs that meet requirements
- Ability to demonstrate creativity and provide costed suggestions for the system and if necessary alternative solutions that still meet requirements
- A clear explanation how risks associated with a new system installation are to be properly managed and mitigated to provide a smooth transition
- A task and finish approach to project management
- Ability to keep accurate records and keep us informed at regular intervals of costs and to keep within budget
- How system operational training will be provided and all system documentation
- How ongoing maintenance, patching and support will be provided
- Experience in backup solutions and indeed recommendations for a reliable backup solution

The successful organisation will be awarded a Contract which is expected to commence in February/March 2018. It is hoped that the solution can be developed and completed during the 2nd / 3rd quarter of 2018 ready for launch in late Spring/Summer 2018.

This would be subject to performance reviews and applicable procurement rules.

All proposals should be costed for a 3 year term.

Intellectual Property

All Intellectual Property created by the successful Supplier in the course of performing the Services or exclusively for the purpose of performing the Services shall ultimately rest with Lantoom Quarry.

Quote Process

Interested organisations are required to submit a response against the question set below:

Company Name:

- Q1. Please detail your organisation's skills and experience in delivering the type of activity detailed in the request for quotation. Please include examples where similar developments have been delivered successfully previously.
- Q2. Please provide details of the relevant professional experience of staff that will be involved in delivering the service.



- Q3. Please provide an outline plan for undertaking this work including expected time to start and finish including user testing time.
- Q4. Please provide a brief description of how the implementation process will be undertaken and how any communications would take place with Lantoom Quarry operational staff i.e. face to face phone e-mail web ex or conferencing tools such as Facetime\Skype.
- Q5. How will you evidence value for money and how will you charge for your services? Please provide examples of costings and explain if your rates are hourly or costed based on an estimate following an agreed specification of work required.

Please ensure all responses are limited to 500 words per question. Responses will be weighted as follows: Q1 15%, Q2 10%, Q3 30%, Q4 30% Q5 15%

Submission

Please return your completed quotation to Will Hugh, whugh@lantoom.co.uk by **17:00 on 16 Feb 2018**. Please put in the email subject line "Order-Accounts-CRM - Submission".

Please direct any questions you have about this quote or the process to the same email address using the email subject line "Order-Accounts-CRM - Questions". The last time and date for clarification questions by **17:00 on 05 Feb 2018**.

Contract Award

Following the review of submissions, organisations may be asked to present their proposal to convey their approach and ideas for the proposed website before a decision is made.

Please note that Lantoom Quarry is submitting a funding application of which if successful the project is part funded by ERDF.

Lantoom Quarry reserves the right to withdraw from the procurement at any point in time during the procurement process.

Lantoom Quarry is committed to creating an environment where there is mutual respect, honesty and equality of opportunity for all. We expect suppliers to share and demonstrate this commitment in their policies and practices.