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User Guide | Ref No: 001253F

# CRM Solutions



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## About YPO

**YPO provides procurement solutions for public sector organisations to set up or renew contracts for a widerange of services.**

Established in 1974 by a group of 13 local authorities, we're one of the UK's largest public sector buying organisation and we're still 100% publicly owned today We work closely with our suppliers and collaborate with other public sector buying organisations to achieve efficiencies and value for money, returning all our profits back into the heart of the public sector

Our team of qualified procurement professionals can offer advice, guidance and expertise on procurement, as well as regular engagement and communication to make sure your objectives are achieved

## Overview

### Start date

2 March 2026

### Expiry date

1 March 2027

### Extension(s) (if applicable)

1+2. Maximum expiry date 01st March 2030

### Contracting authority (CA) call-off period

CA's can specify a contract period, based on the term that will best suit their requirements YPO do not stipulate contract lengths.

### Contract notice reference number

2026/S 000-015319

### Rebate

Upon any spend via the Framework, the supplier must pay YPO 1% retrospective rebate. The Framework is free to access and utilise by all public sector customers

### Geographical location(s)

National

## Access to the Framework

This framework is designed to meet the needs of all public sector organisations, including NHS, education, local authorities, central government, charities, housing and emergency services.

To access the framework agreement and any further information such as:

- Price lists which showcase the scope of products and services they can provide under the Lot
- Evaluated pricing schedule
- Cost award question response
- Framework assessment scores/results from Framework tender
- Responses to the Framework tender
- The full specification
- Call-off templates
- Step by step guide on how to make an award without competition or run a competitive selection process
- Any additional information not listed above

Customers should complete and return the Non-Disclosure and Customer Access Agreement. Please email [itservices@ypo.co.uk](mailto:itservices@ypo.co.uk) for the NDA, or to ask any questions relating to this Framework

## Lot Structure

Lot	Description	No of suppliers/ providers	Method of call-off contracts
1	CRM Solution for YPO (not applicable for YPO customers/call-off contracts)	1	N/A
2	CRM Software Solutions for Wider Public Sector	11	Competitive Selection Process or Award Without Competition

Providers were assessed on the following criteria, which has been used to establish the framework:

Criterion	% Weightings	Sub Criterion	% Weightings
Cost	15%	11 Quotes	40%
		12 Cost Management (Cost Award Question)	60%
Quality	65%	21 Training	10%
		22 Implementation	25%
		23 System Integrations	25%
		24 Infosec and BCDR	25%
		25 Contract and Relationship Management	10%
Social Value/ Sustainability/ Modern Slavery	20%	26 Use of AI	5%
		31 Social Value Themes 1&4	40%
		32 Social Value Theme 5	40%
		33 Modern Slavery	20%

# Benefits of using the framework

YPO's framework agreements are established to allow customers to purchase goods and services from providers via either award without competition or a competitive selection process. Benefits of using the framework agreement:

**1. Available to use by all UK public sector bodies**

This framework is compliant with the PA2023 procurement legislation – we've done the work, so there's no need for you to run a full procurement process, reducing risk and timescales.

**2. Assured provider standards** Providers listed on the framework were assessed during the procurement process for their financial stability, compliance to legislation, experience, and technical and professional ability to give customers confidence of a quality service.

**3. Provider choice** YPO have awarded 11 suppliers on the framework, offering excellent choice and industry expertise.

**4. Pre-defined terms and conditions** The T&Cs of the contract have already been established, accepted and signed by the providers. Upon awarding contracts, customers have the option to use YPO's standard framework agreement terms and conditions as established or use their own if preferred (permitted within competitive selection processes).

**5. No defined call off length** Customers can specify a contract period based on the term that will best suit your requirements YPO do not stipulate lengths of contracts.

**6. Simplified single lot structure** Single Lot structure, meaning simplicity when calling-off.

**7. Choice of call-off routes** Award without competition for a quick, easy and compliant route to market, or re-open award criteria weightings at competitive selection process to suit your specific requirements. [Back to Contents](#)

**8. Access to the latest technology** The framework allows for delivery of solutions using technologies that are currently available and those which evolve throughout the lifetime of the framework agreement, giving you access to the newest equipment and service offerings

**9. Easy to use** Customers need only to identify their requirements, present these to the market and award a contract. This can be done either via YPO or directly with the awarded suppliers/providers

**10. Full support service** YPO can assist you with your procurement and managing the call off-process, from the building of documents, running competitive selection processes and award without competitions YPO can conduct competitive selection processes on your behalf (at no cost to you) taking care of all key areas making the process totally hassle free and compliant with as little or much involvement as you require

- The services we offer includes:
- Publishing the competitive selection process's on our e-tendering portal
- Assisting with award without competitions
- Request for Quotes (RFQ)
- Request for Information (RFI)
- Pre-engagement support
- Templates and much more....



## Suppliers/Providers

Supplier/Provider	Lot 2 - CRM Solutions
Delaware Digital LLP	✓
Deloitte LLP	✓
Ernst & Young LLP	✓
Halo Service Solutions Ltd	✓
Huble Digital Limited	✓
Infosys Limited	✓
Kerv Digital Limited	✓
Phoenix Software Ltd	✓
Provident CRM Limited	✓
Unipartner IT Services SA	✓
Zipline Ltd	✓

## How to carry out an award without competition

Making an award without competition allows you to call-off directly to a chosen supplier without conducting a full competitive process, assuming that customers can demonstrate the selected supplier offers them the most advantageous solution. Customers will be responsible for their assessment of providers to determine an award without competition. Upon signing the NDA, Customers will be able to view the following documentation:

- Step by step guide on how to make an award without competition
- The results of the tender evaluation, including supplier responses and scores
- Results and responses to cost award questions
- Supplier price lists showcasing the scope of products and services they can provide under the Lot
- Evaluated pricing schedules

If you are unable to find a match to your requirements, you can raise a Request for Information (RFI) to the suppliers. You will need to provide a statement of your requirements, so they can direct you to an existing submitted offer or add this solution to their price list

Within an award without competition, customers will need to provide the supplier with the relevant information to deliver your requirements. The following needs to be completed within an award without competition:

- Notify the supplier that you wish to award to them for the contract
- Complete the call-off contract which also includes the order form. You can contact [itservices@ypo.co.uk](mailto:itservices@ypo.co.uk) for a copy of this

- Complete the confirmation of award document (located on the Framework landing page) and send this to [itservices@ypo.co.uk](mailto:itservices@ypo.co.uk)

**Customers should ensure to follow any internal processes and procedures to assess supplier capability and determine if this route offers best value for your procurement.**



# How to carry out a competitive selection process

Customers will be able to evaluate providers on cost, quality and social value/sustainability/modern slavery criteria within their competitive selection process. Like with an award without competition, the customer is ultimately responsible for their competitive selection process, but YPO can assist as much as required.

Customers may request access to the following documentation to support the creation of their competitive selection tender:

- The results of the Framework tender evaluation including supplier responses and scores
- Supplier price list showcasing the scope of products, work, and services they can provide under each lot
- Pricing schedules which were evaluated at Framework level
- Responses and results of cost award question

Customers may run their own competitive selection process, but must ensure the Framework is referenced within documents and ensure YPO have been notified by emailing [itservices@ypo.co.uk](mailto:itservices@ypo.co.uk)

The Customer will identify their Statement of Requirements and all Supplier's will be invited to compete in the process. Customers conducting a Competitive Selection Process will write their own specification around their own requirements which will be evaluated and scored at Competitive Selection stage based on the Competitive Selection award criteria as set out in this Tender exercise.

Customers are permitted to undertake a Single or Multi-stage Competitive Selection Process

and will be allowed to stipulate Conditions of Participation and Mandatory Requirements to refine those set out for framework assessment and define them specific to their Call-Off requirements.

Suppliers awarded to the Framework Agreement will be invited to compete in the process. Suppliers will be required to submit "sealed bids" via the customer's choice of e-tendering site. The Award Criteria for such competitions are specified in table below.

***This framework is designed to meet the needs of all public sector organisations,*** including NHS, education, local authorities, central government, charities, housing and emergency services.

## Criteria for competitive selection process

Criterion	% Weightings	Description
Condition of Participation	N/A	Customers will be allowed to include conditions of participation and MRs to refine those set out for framework assessment.
Cost	10% - 80%	Customers will have the option to amend weightings at the Competitive Selection stage to suit their internal needs/policies. Customers may reopen this criterion in full, or scores may be carried through from the Framework Establishment stage. The total Criterion weightings must add up to 100%.
Non-Cost (Quality)	10% - 80%	Customers will have the option to amend weightings at the Competitive Selection stage to suit their internal needs/policies. Customers may reopen this criterion in full, or scores may be carried through from the Framework Establishment stage. The total Criterion weightings must add up to 100%.
Social Value and Sustainability	10%-30%	Customers will have the option to amend weightings at the Competitive Selection stage to suit their internal needs/policies. Customers may reopen this criterion in full, or scores may be carried through from the Framework Establishment stage. The total Criterion weightings must add up to 100%.

## How to carry out a competitive selection process cont

Customers have the flexibility to adjust the award criteria at Competitive Selection Process stage as per the above table if they wish, the total % must add to 100%.

There are no minimum or maximum timescales that a competitive selection process should be published within, however YPO would suggest that the timescales are relevant to the detail of the specification and documents you publish. Please ensure that the suppliers have sufficient time to respond

YPO can help customers in developing specifications, tender questions, pricing schedules etc. YPO can also manage the competitive selection process, as well as any clarifications which are raised. YPO also hold templates such as decision letters, so please reach out to [itservices@ypo.uk](mailto:itservices@ypo.uk) for assistance

A 10-day standstill period is then voluntary under the YPO framework. When the successful supplier is awarded, customers must complete:

- The Call-off contract which also includes the order form
- The confirmation of award document

## Contact information

For further information or to discuss individual requirements, please use the contact details below:

<b>Name</b>	<b>Dominic Crosse</b>
<b>Job title</b>	<b>Assistant Buyer</b>
<b>Category</b>	<b>ICT</b>
<b>Call</b>	<b>07540 670 275</b>
<b>Email</b>	<a href="mailto:itservices@ypo.co.uk">itservices@ypo.co.uk</a> <a href="mailto:dominic.crosse@ypo.co.uk">dominic.crosse@ypo.co.uk</a>



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