



NEWETT HOMES

DIGITAL TRANSFORMATION PROJECT: INVITATION TO TENDER

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Registered in England No: 10402485



OVERVIEW:

Newett Homes is a family-owned house builder formed through two generations working together, David Newett and his son Will Newett. The company was founded in 2016 and specialises in building high quality two-to-five-bedroom homes - both private sales and working with affordable housing providers to deliver affordable housing projects. With a sizeable landbank, Newett Homes plans to deliver more than 400 homes per year across Yorkshire by 2028. For further information, please visit our website www.newetthomes.co.uk.

THE PROJECT:

Newett Homes is embarking on a comprehensive digital transformation initiative aimed at revolutionising its operational procedures and enhancing connectivity across departments. This project seeks to leverage advanced technological solutions to streamline workflows, improve communication, and support the company's growth objectives. The initiative will be divided into three key areas, each targeting specific aspects of the business operations.

1. CRM System Development: **(REF - NH-DTI-001)**
Implement a robust CRM system tailored to the needs of the sales team. This system should advance features such as lead categorisation, website tracking, email monitoring, and have integration with the VOIP phone system.
2. Project/Task Management System: **(REF - NH-DTI-002)**
Create a customized project/task management system accessible through a staff portal on the company's website. This system should centralise project management activities, facilitating collaboration and enhancing efficiency in task allocation and monitoring.
3. COINS Software Development: **(REF - NH-DTI-003)**
Upgrade and development of the COINS software to optimise business processes across all departments. This development should improve operational controls, enhance efficiencies, and align with growth targets.



REQUEST FOR TENDER: CRM SYSTEM DEVELOPMENT

OVERVIEW:

Newett Homes is a family-owned house builder formed through two generations working together, David Newett and his son Will Newett. The company was founded in 2016 and specialises in building high quality two-to-five-bedroom homes - both private sales and working with affordable housing providers to deliver affordable housing projects. With a sizeable landbank, Newett Homes plans to deliver more than 400 homes per year across Yorkshire by 2028. For further information, please visit our website www.newetthomes.co.uk.

THE PROJECT:

Newett Homes is embarking on a comprehensive digital transformation initiative aimed at revolutionising its operational procedures and enhancing connectivity across departments. This project seeks to leverage advanced technological solutions to streamline workflows, improve communication, and support the company's growth objectives. The initiative will be divided into three key areas, each targeting specific aspects of the business operation. The development of a bespoke CRM system is critical to support our sales team and assist with us achieving our growth targets.

The project will provide a user-friendly, GDPR compliant cloud-based Customer Relationship Management (CRM) that enables us to automate and manage our communications, digital marketing, and reporting of activity with our stakeholders using workflows, then present that data using customisable dashboards.

With ambitious plans for growth in the next five years, we require a system that provides clear visibility of our customers and the relationship they have with their reserved plot, such as solicitor information, build progress and customer interactions. On top of this, the CRM needs to store all information about every plot on every development that can be then held inside a database to be used on a new website. Ultimately, from a marketing perspective, the CRM must work seamlessly and be the central repository and reporting system.

Like many housebuilding businesses, Newett Homes use the COINS ERP system for planning and reporting across sales, construction, commercial and finance. The CRM System needs to integrate with COINS to ensure the sales data in the CRM system is pulled through to COINS to be available for other departments who continue to work on this system. To facilitate this, we must also develop a bespoke 2-way API.

Tender Reference Number: NH-DT1-001

Issue Date: 28/03/2024



REQUIREMENTS SPECIFICATION:

The supplier is required to meet the following specification:

- An intuitive, easy to use, system.
- Complies with GDPR legislation, with the ability to update, report and delete information.
- Powerful data mining tools that allow us to segment data easily and quickly.
- Fully integrated with Outlook to allow appointments to be linked with the employees calendar.
- Easy reporting, to include ability to identify new contracts in a specified period.
- The ability to hold data inside a database and manipulate it to create dynamic website pages.
- Workflows to provide a level of automation for marketing purposes.
- API Requirements – a 2-way sync between COINS ERP and the CRM.
- A second 1-way sync between the CRM and the database to aid website creation.

TENDER RESPONSE:

Suppliers should outline how they meet the requirements outlined in the specification in their proposal document.

A proposal for undertaking the work should include:

- An understanding of our requirements and vision for the project
- A thorough description of the services proposed, and a demonstration of the system either in person or through a teams call.
- A project plan with timescales
- A breakdown of ongoing support offered by the supplier following implementation
- A fixed fee for the project and chargeable rate for any additional work required

CONDITIONS OF TENDER:

Eligibility – All bidders must meet or exceed the following criteria:

1. Be expert users of CRM system that can be linked to COINS ERP either natively or via API.
2. Be able to deliver all specific project points within the tender.
3. Be able to deliver the project within the company required timeline of 31st December 2024.
4. Be able to offer post project support.

EVALUATION CRITERIA:

Bids will be evaluated based on the following criteria:

1. Proven level of competency and system knowledge
2. Tender price
3. Availability and timeline to delivery



4. Level and Type of support offered during project.
5. Training Supplied
6. Level, type and duration of support offered post project completion.

See attached bid scoring spreadsheet template.

SUBMISSION DETAILS:

1. Deadline for Submission: Thursday 11th April 2024 @ 17:00 – extensions must be communicated via email to Charlotte Hassman, charlotte@newetthomes.co.uk with your intention to bid along with a reasonable request for extension.
2. Tender Validity Period: 3 months after 11/04/2024.
3. Submission Method: please submit all bids via email to Charlotte Hassman, charlotte@newetthomes.co.uk

Supplier selection will take place 12th April and bidders will receive notification by email if they have been successful by 15th April 2024.



REQUEST FOR TENDER: PROJECT/TASK MANAGEMENT SYSTEM

OVERVIEW:

Newett Homes is a family-owned house builder formed through two generations working together, David Newett and his son Will Newett. The company was founded in 2016 and specialises in building high quality two-to-five-bedroom homes - both private sales and working with affordable housing providers to deliver affordable housing projects. With a sizeable landbank, Newett Homes plans to deliver more than 400 homes per year across Yorkshire by 2028. For further information, please visit our website www.newetthomes.co.uk.

THE PROJECT:

Newett Homes is embarking on a comprehensive digital transformation initiative aimed at revolutionising its operational procedures and enhancing connectivity across departments. This project seeks to leverage advanced technological solutions to streamline workflows, improve communication, and support the company's growth objectives. The initiative will be divided into three key areas, each targeting specific aspects of the business operation. The development of a bespoke project/task management system accessed via a staff portal on our website will help to streamline business operations and increase the productivity and better manage the workload of our expanding team of staff.

The system will be entirely bespoke and built for Newett Homes. The initial focus of this system will encompass a staff task management system which will improve communication throughout our teams by recording meeting minutes and actions in a central location and being able to task or delegate these to other members of the team. We are going through a period of rapid expansion; we are currently live on 5 developments, increasing to 20 live developments by the end of 2026. To support our staff to manage their workloads and prioritise effectively, it is crucial that they can track and manage their actions from key business meetings, and ensure they are prioritised in line with business requirements, this system will ensure all staff have visibility of actions and priorities.

Tender Reference Number: NH-DT1-002

Issue Date: 28/04/2024

REQUIREMENTS SPECIFICATION:

The supplier is required to meet the following specification:

- Website portal with staff log in.



- Dashboard showing all tasks, what priority level they are, target completion date.
- Ability to delegate.
- Email notification system for assigned/delegated/overdue/completed tasks.
- Project management process with key milestones and checkpoints.
- Ability to hold meeting agenda's and minutes.
- Ability to print minutes directly from the portal.
- Reporting system to provide overview of project progress.

TENDER RESPONSE:

Suppliers should outline how they meet the requirements outlined in the specification in their proposal document.

A proposal for undertaking the work should include:

- An understanding of our requirements and vision for the project
- A thorough description of the services proposed, and a demonstration of the system either in person or through a team's call.
- A project plan with timescales
- A breakdown of ongoing support offered by the supplier following implementation.
- A fixed fee for the project and chargeable rate for any additional work required.

CONDITIONS OF TENDER:

Eligibility – All bidders must meet or exceed the following criteria:

1. Be able to develop a bespoke system.
2. Be able to deliver all specific project points within the tender
3. Be able to deliver the project within the company required timeframe of 31st December 2024.
4. Be able to evaluate the company's proposed system and offer recommendations over and above specified project points.
5. Be able to offer post project support.

EVALUATION CRITERIA:

Bids will be evaluated based on the following criteria:

1. Level of customisation offered on system
2. Tender Price
3. Availability and timeline to deliver.
4. Level and Type of Support offered during project.
5. Training Supplied.
6. Level, type and duration of support offered post project completion.

See attached bid scoring spreadsheet template.



SUBMISSION DETAILS:

1. Deadline for Submission: Thursday 11th April 2024 @ 17:00 – extensions must be communicated via email to Charlotte Hassman, charlotte@newetthomes.co.uk with your intention to bid along with a reasonable request for extension.
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REQUEST FOR TENDER: COINS SOFTWARE DEVELOPMENT

OVERVIEW:

Newett Homes is a family-owned house builder formed through two generations working together, David Newett and his son Will Newett. The company was founded in 2016 and specialises in building high quality two-to-five-bedroom homes - both private sales and working with affordable housing providers to deliver affordable housing projects. With a sizeable landbank, Newett Homes plans to deliver more than 400 homes per year across Yorkshire by 2028. For further information, please visit our website www.newetthomes.co.uk.

THE PROJECT:

Newett Homes is embarking on a comprehensive digital transformation initiative aimed at revolutionising its operational procedures and enhancing connectivity across departments. This project seeks to leverage advanced technological solutions to streamline workflows, improve communication, and support the company's growth objectives. The initiative will be divided into five key areas, each targeting specific aspects of the business operation.

The COINS software underpins the housebuilding industry, and whilst we currently use COINS in a limited capacity, it is imperative we develop COINS to deliver the level of reporting that we need to facilitate our growth plans.

Tender Reference Number: NH-DT1-003

Issue Date: 28/03/2024

REQUIREMENTS SPECIFICATION:

The supplier is required to meet the following specification:

- Upgrade and Implementation of CVR module to include:
 - Comprehensive CVR suite of reports
 - Key User Training and supply of user training material
- Upgrade and reconfiguration of HB CRM module to include:
 - Company Specific reporting for the following modules
 - Sales - Prospects
 - Sales - Workbench
 - Sales - Forecasting
 - Supply of user training material
- Implementation of Company Workflow process
 - Review and input of authorisation matrix into COINS system to ensure robust sign off process across procurement, purchase ledger and subcontract ledger modules

- Upgrade and reconfiguration of Customer Care module
 - Roll out of MCare Customer Care app
 - Supply of user training material
- Upgrade of Construction Module
 - Suite of Reports in line with company specification to include:
 - Smartie Report (Containing all required fields of information)
 - Build Forecasting report
 - EU Reporting
 - Supply of training materials.
- Upgrade of Financial Reporting Suite to include:
 - Financial Reports including consolidation
 - Staff, overhead and plot reports.
- Fixed Asset Module Training
 - Supply of training material
- Procurement and Purchase Order module:
 - Supply of training material

TENDER RESPONSE:

Suppliers should outline how they meet the requirements outlined in the specification in their proposal document.

A proposal for undertaking the work should include:

- An understanding of our requirements and vision for the project
- A thorough description of the services proposed, and a demonstration of the system either in person or through a team's call.
- A project plan with timescales
- A breakdown of ongoing support offered by the supplier following implementation.
- A fixed fee for the project and chargeable rate for any additional work required.

CONDITIONS OF TENDER:

Eligibility – All bidders must meet or exceed the following criteria:

1. Be expert users of COINS
2. Be able to deliver all specific project points within the tender
3. Be able to deliver the project within the company required timeframe of 31st December 2024.
4. Be able to evaluate the company's current system and offer recommendations over and above specified project points
5. Be able to offer post project support

EVALUATION CRITERIA:

Bids will be evaluated based on the following criteria:

1. Proven level of Competency and System knowledge
2. Tender Price



3. Availability and timeline to deliver
4. Level and Type of Support offered during project
5. Training Material Supplied
6. Level, type and duration of support offered post project completion

See attached bid scoring spreadsheet template.

SUBMISSION DETAILS:

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