

Request for Proposal / Quotation

For a content research partner to deliver initiatives designed to help Be the Business deliver evidence-based content inspired and shaped by SME leaders

13th November 2020

Be the Business

The logo for 'Be the Business' features a stylized arrow pointing upwards and to the right, followed by the text 'be the business' in a bold, lowercase, sans-serif font. The word 'be' is smaller and positioned above 'the', which is above 'business'.

**be the
business**

Table of Contents

- Overview 3
- Confidentiality Statement 4
- Terms and Conditions of this Proposal..... 5
- Section 1 – Project Context 6
 - Be the Business Background 6
 - Our Intention..... 6
 - Our Activity So Far..... 6
 - Our Vision and Project Objectives 7
 - Project Deliverables 8
- Section 2 - Proposal Application Requirements..... 9
 - Company Overview 9
 - Approach, Project Plan & Deliverables 9
 - Team..... 9
 - Assumptions & Risks 9
 - Fees & Value for Money 10
 - References and Credentials..... 10
- Section 3 – Budget, Project Timings, and Process..... 11
 - Project Budget 11
 - Project Timeframe..... 11
 - RFP Agenda 11
 - Submission Deadline 11
 - Submission Delivery Details..... 11
 - Submission Questions and Clarifications 12
 - Financial Credentials 12
 - Key Contacts..... 12

Overview

Be the Business helps the country's small and medium businesses to grow and improve, through a series of initiatives, communities, and guidance in the form of case studies, action plans and tools. It's our mission to help every firm in the country improve their performance, and we are looking for a content research partner to help us realise this mission.

The following pages aim to give you context on our work, the project, 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.

Zoe Stead-Hall

Programme Manager

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, which is defined as confidential information concerning the business, affairs, customers, clients or suppliers of Be the Business.

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, Be the Business will endeavour to act fairly and reasonably in all its dealings with interested suppliers and Bidders, 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 Bidder 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 3 of this document.

Successful suppliers will be subject to Be the Business standard Terms of Reference, Terms and Conditions and data sharing requirements. Terms and Conditions and data sharing agreements will be sent to shortlisted Bidders for review.

Where no notice is given, all information contained herein is Copyright 2020 Be the Business.

Section 1 – Project Context

Be the Business Background

Be the Business is a not-for-profit movement helping every firm in the country improve their performance. We work with the entire business community to share what works for today's best businesses 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.

Be the Business's target audience is the UK's SME community, and it delivers a number of programmes to support these firms. These programmes include Productivity through People, a 12-month programme delivered to SME leaders through business schools; and Mentoring for Growth, a mentoring scheme which pairs SME leaders with mentors from some of the UK's leading firms. Be the Business also has a number of digital products. These include our website (<https://www.bethebusiness.com/>), and Be the Business Digital, which provides free and independent support to SME leaders who are looking to adopt new technologies (<https://bethebusiness.tools/>).

In addition to programmes, Be the Business also produces a wide variety of content, in the form of case studies, guides, templates, and action plans. This information is then presented to, and used by, SME leaders across the UK.

Our Intention

Be the Business aims to ensure that any guidance or advice offered to SMEs is accurate, helpful, and evidence-based. Our best content is often based on a blend of insights from experts and SMEs themselves. Our users often tell us that our content is at its most impactful when it is clearly inspired by the thinking and experiences of other SME leaders.

As our content offering expands, we aim to ensure that all our content is founded in 'bottom up' best practice, based on evidence provided by SME leaders who have experienced the problem themselves. This allows us to write with confidence and relevance about a topic as the information is sourced from 'SMEs like you who have experienced the same problem'. It gives us both confidence and credibility.

We are currently preparing for the release of a new, upgraded digital offering which will see us deliver a larger volume of content in a more structured way. As part of this we are looking for more robust and repeatable approaches to gathering the kind of bottom up insights we need. We are looking for a partner to help us with this.

Our Activity So Far

As part of our work to develop Be the Business Digital, we ran 10 workshops of 6-8 SME leaders each, focusing specifically on technology adoption. These workshops were used to gain valuable

guidance and insights, which was then used to inform the content that was produced. Examples of the kind of content research and what this enabled us to produce can be found below:

This link shows part of a step by step process for a firm to follow to adopt technology:

<https://bethebusiness.tools/our-process-covers-everything-you-need-adopt-technology-successfully/creating-your-shopping-list/>

This link shows a downloadable asset which firms can use in their own technology adoption journey:

https://media.bethebusiness.tools/documents/Software_guide_stage_3_-_Features_checklist.pdf

Participants were recruited and paid for their attendance in order to ensure a representative sample. Sessions were filmed and professionally facilitated. Three key open-ended questions were asked, and then participants were paired off to complete a template document capturing their answers, before presenting their outcomes to the wider group, which facilitated further discussion.

Be the Business is launching a new digital platform, offering SME leaders a broad range of content, tools, programmes, and advice, in early 2021. This platform, unlike BtB Digital, will not be solely focused on technology adoption, but will cover five key 'pillars'; People & Team, Sales & Growth, Digital Readiness, Planning, and Leadership & Strategy. Content must be produced for all five pillars.

Our Vision and Project Objectives

We aim to develop and deliver accurate, helpful and relevant content to SME leaders, via the new digital platform, enabling businesses to take ongoing actions and tackle challenges head on.

The objective of this project is to work with a content research partner to gain valuable insight from a broad range of SMEs, which can then be used to inform the content produced and delivered on the platform. The partner should help us to:

- Consult dozens of SME leaders across a broad range of demographics, geographical locations, and attitudes
- Ask open-ended questions that encourage thoughtful responses and discussion
- Present insightful findings as a result of the research
- Assist in validating and quality assuring the research

By conducting this research we aim to:

- Gain an understanding of the experiences of our users and what triggered their actions
- Use bottom-up thinking to inform our overall content strategy
- Facilitate peer support and discussion amongst SMEs

As a result:

- The content produced will be more relevant to users and resonate more strongly
- The content produced will be verifiable by evidence and insight
- Research participants may be used as case studies on the platform

- We will build overall credibility of Be the Business with our users and other stakeholders

Project Deliverables

The content research partner selected will:

- **Plan** the necessary interviews, focus groups, workshops and/or calls
- **Recruit** a broad range of SMEs (as defined by Be the Business)
- **Manage** the distribution of incentives (as relevant)
- **Facilitate** the workshops and ensure sufficient additional observers to take notes
- **Record** the workshops for Be the Business to view later at their convenience
- **Present** detailed and insightful reports of findings to Be the Business, that are evidence based and quality assured

Be the Business hopes to conduct research of 80+ SME leaders across this project. This can be conducted in various ways; e.g. workshops or calls with individuals. If this first phase of work is successful, we may seek to extend the scope of the work to explore further topic areas or more detailed insights.

The research partner will recruit the necessary SME leaders to ensure a representative sample. The research partner will manage any necessary consent, data-sharing agreements, scene-setting and any relevant pre-work. The research partner will also handle any payment of incentives for attendance where appropriate.

Sessions will be facilitated by the research partner, to foster structured discussion, comments and responses (both verbally and written in a template document). The research partner should create any necessary documentation for the sessions; e.g. discussion guide. All sessions to be recorded for research purposes. These recordings to be made available to Be the Business to view at their convenience.

Following the sessions with SME leaders, the research partner should produce reports based on collated outputs that are analysed to identify the key challenges, creating helpful insights that help Be the Business better understand SME leaders, identify content areas to focus on, and develop the content itself.

Be the Business would like the content research partner to manage the project and be responsible for delivering the project end-to-end.

Section 2 - Proposal Application Requirements

Bidders who wish to be considered should provide a proposal which covers the below points. Your response should be provided as answers to the series of questions below. Please limit the length of your response to 20 slides or 15 pages of text. Please provide your response as a PDF document, so we ensure your formatting and content is as you intend it to appear, submitting it to the correct email address by the date stated in Section 3.

Company Overview

Describe your organisation. Please include:

- Examples of your relevant experience, and how you have worked with clients to address similar challenges in the past
- Your experience working with charitable organisations
- What makes your organisation a good partner for Be the Business in this work

Approach, Project Plan & Deliverables

Describe the approach you will take to the project. Please include:

- What methodology you will follow, how you will structure the work, and why you have selected this approach
- Initial thinking on potential mix of interviews, workshops and other, and the numbers of SME leaders you anticipate recruiting for each
- How you plan to run, facilitate, observe, and gain insight in the sessions, particularly in light of Coronavirus and an inability to hold in-person sessions
- A scope of anticipated insights we could expect to receive in the reporting
- An approximate timeline with key milestones and deliverables

Team

Describe the approach you will use to resource the project. Please include:

- The team structure you would recommend and why you have selected this approach
- Personal biographies of the proposed team members including experience and key skills (and where applicable related to your references)
- Whether any of the work will be outsourced to a third party, if so which parts and why

Assumptions & Risks

Describe the assumptions you have made and how you will manage risk. Please include:

- Any key assumptions you have made in developing your response

- Your perspective on the risks that need to be considered, and how you would approach managing them
- A draft of critical success factors

Fees & Value for Money

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

- Proposed staffing structure and associated rates and time against the plan
- How you would allocate the budget over the project, and what approach to fees you would recommend
- The basis on which you would price ongoing support as well as additional pieces of research beyond this first phase if requested, please include a rate card or similar
- How you would help us ensure value for money

References and Credentials

Share relevant experience and testimonials. Please include:

- Descriptions of previous experience on similar pieces of work
- Any testimonials you can share from recent projects with similar challenges

Section 3 – Budget, Project Timings, and Process

Project Budget

We are looking for bidders to set out plans to deliver a service that meets our needs and represents value for money. Your proposal for the first phase of work should not exceed £100k (excluding VAT), and consideration of our charitable status is appreciated. A payment schedule will be discussed with the preferred supplier once selected. Please also set out how any ongoing work after this initial phase would be priced, if such further work were requested. Please include a rate card or similar to illustrate how this would be calculated.

Project Timeframe

Be the Business anticipates that this work will be conducted over approximately 3 months from mid-December 2020 to mid-March 2021.

RFP Agenda

Event	Deadline Date
RFP published and released to market	Friday 13 th November
Deadline for clarifying questions and documentation requests	Tuesday 17 th November, 17:00 BST
Response to clarifying questions	Thursday 19 th November, 17:00 BST
Response deadline	Friday 27 th November, 14:00 BST
Selection of shortlisted applications	Tuesday 1 st December
Presentations by shortlisted applicants	Wednesday 2 nd December
Selection of preferred supplier	Monday 7 th December
Project start date	Thursday 17 th December

Submission Deadline

All responses must be received by Friday 27th November at 14:00 BST.

Submission Delivery Details

All submissions for responding to this request must be submitted electronically by email to zoe.stead-hall@bethebusiness.com and tom.gibson@bethebusiness.com.

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

Shortlisted bidders will be asked to present their approach on Wednesday 2nd December at an online meeting. 50 minutes will be allocated for each bidder, with twenty minutes for a presentation followed by questions.

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 clarifying questions deadline on Tuesday 17th November, 17:00 BST. Questions and responses will be collated and shared with all bidders on Thursday 19th November by 17:00 BST.

Contact 1 (Primary)

Zoe Stead-Hall

Programme Manager

Email: zoe.stead-hall@bethebusiness.com

Contact 2

Tom Gibson

Head of Digital and Tech Adoption

Email: tom.gibson@bethebusiness.com

Financial Credentials

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

Key Contacts

The Bidder must clearly state on their submission the following key contacts:

1. Primary Contact
 - Full name
 - Address
 - Telephone
 - Email

2. Finance Contact (if different)
 - Full name
 - Address
 - Telephone
 - Email