



RM3774 Campaign Solutions and RM3796 Communication Services Checklist

Pre-market engagement

Dos

- ✓ Contact all agencies on the framework using the same method of communication (e.g. email, portal message etc.)
- ✓ Provide a reasonable period of time for responses to questions
- ✓ Set clear deadlines for responses
- ✓ Keep an audit trail of all communications
- ✓ For face to face engagement, create a script of the questions you would like to ask the agencies to ensure uniformity

Don'ts

- ✗ Contact a select few agencies e.g just those you are familiar with
- ✗ Use different methods to contact the agencies e.g call some agencies and email other agencies. They must all be contacted via the same method of communication

Issuing your brief

Dos

- ✓ Ask your department's Superuser to look over your brief
- ✓ Get your brief approved by your department
- ✓ Appoint a backup evaluator to cover unavailability. If used, they will need to evaluate the responses from beginning to end
- ✓ Clearly state the name and reference number of the framework on the front of your brief
E.g RM3774 CCS Campaign Solutions
- ✓ Make sure the information requested is proportionate to the scope and value of your brief
- ✓ Clearly specify key requirements that need to be fulfilled
- ✓ Include an indicative budget in your brief
- ✓ The longer the response time, the better the response. Remember to give the agencies sufficient time to respond to each stage of your competition, especially between the written submission and pitch stage
- ✓ Send the brief to all agencies on the framework unless they have excluded themselves in a capability assessment
- ✓ Remember to factor the 1% Management charge in addition to your campaign I budget (for CG only)
- ✓ State whether there will be a face to face pitch and what form it will take
- ✓ Provide a clarification period for agencies to ask questions about your brief. Ending no later than 72 hours before the deadline of your brief, longer if possible to give agencies time consider the response
- ✓ Keep all clarification questions in one document adding updates to it
- ✓ Ensure that agencies have equal access to information before and during the tendering process
- ✓ Stick to the stated time scales for the procurement. If things change, advise all agencies so they can plan accordingly
- ✓ Remember to keep an audit trail of all communications with the agencies

Issuing your brief

Don'ts

- ✗ Try not to overload the agency with too much information, appendices and data
- ✗ Be overly prescriptive, give your agency room to exercise their expertise and creativity
- ✗ Use acronyms, technical terms or civil service terms
- ✗ Be too brief in your brief. Let the agencies know what your desired outcomes are
- ✗ Ask for financial details or case studies. Agencies have been robustly assessed on this at framework level
- ✗ Rely on stock responses to clarification questions
- ✗ Ask for creative strategy in the first stage of the competition (if two stages used)
- ✗ Change your deadlines unless it is necessary
- ✗ Change your evaluation criteria after the brief has been issued
- ✗ Include research documents in your brief unless necessary
- ✗ Forget to make clear any perceived conflict of interest in your brief

Face to face pitch stage

Dos

- ✓ Clearly state in your brief whether you intend to hold a face to face pitch and how many agencies you intend to invite
- ✓ Only invite agencies to pitch who have a realistic chance of winning
- ✓ Inform agencies in advance of a pitch, who will be evaluating the presentation and their role in the organisation/campaign. These should be the same evaluators used at the written stage
- ✓ Request that the agency's pitch team includes the key people that will be working on the project
- ✓ Ensure that the agencies are aware of any technological and any other room restrictions for the pitch
- ✓ Communicate any additional information that comes out of a face to face pitch with all shortlisted agencies

Don'ts

- ✗ Discuss additional information about a the brief, which has not been shared with all the other shortlisted agencies
- ✗ Change or introduce new elements to the brief or evaluation criteria
- ✗ Share information which might be commercially sensitive to an agency
- ✗ Zero your scores from the written stage. You must carry them over to the pitch stage to get a total score

Award stage

Dos

- ✓ Draft the letter of appointment to contract with your winning agency
- ✓ Provide all agencies with constructive feedback
- ✓ Send CCS details of your brief including: the winning agency, contract start date and contract value info@crownccommercial.gov.uk with the framework name and number in the subject
- ✓ Ask the agencies for feedback on the quality of your brief once the procurement is completed

Don'ts

- ✗ Be subjective in your feedback, stick to comments against the evaluation criteria
- ✗ Start work on your campaign prior to signing your contract

