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Multifunctional Devices, Managed Print and Content Services and Records and Information Management

RM3781

Lot 7

**Audit & Consultancy
Benefits**

Version
1.1

What is the Lot 7 service provision?

The Lot 7 Suppliers will provide customers with entirely Independent Vendor Neutral Audits and Consultancy Services delivering evaluation, advice and recommendation in the context of sound strategic judgement for:

- Managed Print and Content Management Audits and Consultancy and/or
- Records Management Audits and Consultancy services

Scope of the Lot 7 service

The scope of the Lot 7 services requires the Supplier to:

- Undertake in-depth analysis of your current position to determine potential savings and/or efficiencies;
- Provide advice and recommendations on your options for example: strategic change; process efficiencies; savings and cost control opportunities;
- Provision of total cost transparency to you regarding your existing Services;
- Objective, professional advice and Audits regarding how you may move towards the management of your Managed Print and Content Management and Records Management requirement - together or as interdependent areas;
- Provide you with an in-depth report detailing all finding and recommendations proposed; and
- Advice and assistance during further competition process, for example: preparation of tender documents, assessments of responses, monitor and measure realisation of benefits.

Please note, the Lot 7 Audit and Consultancy services can also be used to support any additional services you may require from within additional Lots within this framework:

- Lot 2: Multifunctional Devices (MFDs) and Print Management Software Services
- Lot 3: Managed Print and Content Management Services
- Lot 4: Records Information Management Services
- Lot 5: Scanning Services

How many suppliers are available?

There are three suppliers available under this Lot. Each of these suppliers provide Audits and Consultancy services for both Managed Print and Content Management and Records Management services.

In order to obtain your Lot 7 service, you will be required to undertake a further competition exercise, inviting all three suppliers to bid for your requirement, as direct award is not permitted.

Once you have identified your winning Supplier you can agree and award a formal contract to that Supplier, and the contractual details of your agreement should be entered into a Call Off Agreement.

A copy of the Call Off Agreement (listed on web page as Call Off Order Template) is located within the 'Document' tab on the RM3781 framework page. You may use this document, or alternatively your own order form. If using your own order form, **please ensure you quote RM3781 within the agreement in order for the framework terms and conditions to apply.**

Supplier contact information is available at the end of this Customer Guidance document

What Audit and Consultancy services are there for Managed Print and Content Management?

In the current climate where austerity measures are placing huge pressure on budgets, the benefits of conducting a print audit have never been greater and the need to maximise efficiency is critical.

A print audit would be particularly beneficial where answers to all or some of the following are unknown:

- ✓ How many devices are on site?
- ✓ The location of each device including make, model and serial number.
- ✓ Features available on each device (colour-capability, duplexing, sorting, stapling, etc.).
- ✓ Are they networked, networkable or locally attached?
- ✓ What other relevant devices are on site (printers, scanners, faxes, stand-alone copiers)?
- ✓ Who uses each device and for what purpose?
- ✓ What print/copy volumes are generated by each device?
- ✓ Expenditure on printing by user, department, location and total?
- ✓ Which devices are fully utilised and which are not?
- ✓ The ratio between mono and colour print volumes?
- ✓ The user per device ratio?
- ✓ Are the current devices fit for purpose?

What typically is a print audit?

A print audit typically will provide full visibility of your existing print fleet, device locations, outputs and power usage. This information will enable you to make key decisions when developing your future print strategies.

There are a number of levels to a print audit:-

- A simple physical audit that will map and profile your current devices. This will provide details of features, exact locations, volumes, configurations and running costs based upon a snapshot assessment
- A more complex audit involving electronic data collection and physical floor walking. The
 - print audit software can be deployed over varying periods of time to capture machine utilisation and pick up cyclical trends. This may be repeated to check/confirm the findings.
- Staff interviews can be conducted on a one to one basis to understand work profiles, peak and off peak periods, document types etc.
- Energy and paper usage can be tracked
- A baseline of costs can be calculated using actual client data and a projection of future

savings can be made taking into account the solution designs produced

- Full business case reports and solution designs can be provided to form the basis of future print strategies and help demonstrate the benefits of any potential change in fleet management OR used as the basis of a competition document via Lots 2 or 3 of the RM3781 framework

What Audit and Consultancy services are there for Records Management?

The Suppliers can provide a wide range of services to you, but as a minimum they will be able to:

- Identify and review the current processes of your On Site Records Management provision;
- Consider how your Records File Store is racked and make recommendation for revised storage provision
- Recommend cost and space creation initiatives for storing and quickly retrieving your records
- Conduct and audit on records not retrieve for period of time and therefore potentially classed as 'Inactive'
- Conduct audit of your records to determine revised retention and/or destruction policies
- Identify options and cost benefit analysis for utilising digital services i.e. back scanning, forward scanning etc.

Supplier Personnel

Each Supplier will as a minimum provide the following Supplier Personnel grades:

Trainee	Audit Manager	Senior Audit Manager	Partner/Director
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Why consider Lot 7?

- **Independence** – Lot 7 has been specifically developed in response to customer feedback where an independent view of costs was identified as a requirement for customers in order to be used and inform future strategy. Previously, many customers conducted audits with incumbent suppliers and found that they only provided a partial summary view of the existing position. In some circumstances, the recommendations were biased and favoured the incumbent supplier. In many such cases, the costs proposed were seen to be inflated in order to make potential savings look as attractive as possible.
- Independent audit companies are primarily focused on reducing customer costs and any environmental impacts, improving operational efficiency and document security. Under Lot 7, they will not be trying to sell additional hardware or services.

- **Specialist Knowledge** - The specialist knowledge, capability and expertise delivering audits to organisations of varying sizes can help inform your future Print, Fleet and Records Management strategies and policies.
- **Intellectual Property** - Audits are often offered as ‘free of charge’ and can be used by vendors as an introduction to their services. However, in some circumstances (where this is the case), there are restrictions as to who owns the intellectual property of the information and data supplied. This often proves challenging if the information is then intended to be used as part of future procurements (a further competition or a business case). By using Lot 7, the intellectual property of the data produced as part of an audit will always be retained by the customer and therefore can be used to inform or as part of any subsequent procurement or strategy.
- **Fleet Management** - Using the outputs from the audit will enable further efficiencies within the print fleet. By understanding which machines are working to their optimum capacity and which are not, a balanced deployment of machines can be developed and future costs minimised as a result.
- **Self-financing** – With insight into your organisation, suppliers are able to call on their expertise to offer unbiased suggestions and recommendations to maximise both cashable and non-cashable savings potential.

What weightings can I use at further competition?

When conducting a further competition, you are able test the Supplier’s responses to your specific requirements on both quality and price.

You may determine your criteria and weighting within the following ranges:

Price 40-60%	Quality 40-60%
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Further information on weightings can be found within CCS website (refer to link below) inside the ‘Document’s tab.

<http://ccs-agreements.cabinetoffice.gov.uk/contracts/rm3781>

The overarching Framework Agreement and your Call Off Agreement following further competition

The Framework Agreement is the overarching contract between each of the Suppliers and CCS. This agreement is for four years and expires 26th October 2020.

During this four year period, you are able to undertake a further competition with all Lot 7 Suppliers awarding your contract - called a Call Off Agreement - to your winning Supplier **for a maximum of five [5] years.**

Pricing

The framework rates are the maximum rates the Suppliers can charge at any point during the overarching Framework Agreement. These rates will remain fixed for the first two [2] contract years of the Framework Agreement between the Supplier and CCS.

When you undertake a further completion, it is expected the Suppliers will reduce these rates again in order to obtain your business.

- The Supplier's Day Rate charges include costs associated with providing the On Site and Off Site services as specified within the framework specification of requirements.
- These rates do NOT include the Supplier's travel and subsistence costs which will be chargeable to you, but will be in line with your specific travel and subsistence policy.

Supplier Contact Details

Customers are strongly advised to engage early with all suppliers when considering Lot 4.

Supplier	Service Information	Further Competitions to:
EKM Global Ltd	Ian McRae Office: 01985 217920 Mobile: 07568 108833 Email: ian.mcrae@ekmglobal.com	ian.mcrae@ekmglobal.com
Purosolutions Ltd	Stephen Taylforth Office: 01422 342794 Mobile: 07940 585376 Email: stephen@purosolutions.co.uk	consultants@purosolutions.co.uk
UK Print Audits Ltd	Steve Purvor Mobile: 07708 932294 Email: steve.purvor@ukprintaudits.co.uk	office@ukprintaudits.co.uk

For further information please contact:

CCS: Customer Helpdesk – 0345 410 2222 / info@ccs.gsi.gov.uk

YPO: Zoe Morgan-Kriek – 01924 821755/ zoe.morgan-kriek@ypo.co.uk

ESPO: Krishna Mistry – 0116 294 4072 / resources@espo.org