



## **Request for Quotation**

### **Sales & Marketing Project**

#### **Background**

Woods Squared started trading in January 2007 and has since grown to a team of 8 operating from their offices in Prenton. The business specialises in offering tailored financial support packages to owner managed businesses across the North West.

#### **Requirement**

Key aspect of the project are:

1. Business Review/Audit – understand where the business is now, where it wants to get to and the gap it is looking to close
2. Sales & Marketing Playbook
3. Ongoing mentoring, support & accountability

We are looking for help with creating a sales and marketing plan for our business to help increase the number of clients that we work with. The plan should link with our specialist services and be focused on our target markets. We would also like a sales playbook to be created so that we have a system that allows both the marketing and the sales to be delegated to other team members so that the business can gain an advantage from upskilling their existing team.

The proposal should also include a provision for ongoing monitoring, support and coaching to help ensure that the marketing plan and sales playbook are embedded within the business. We would also be looking for some assistance as and where necessary to help to actually implement some of the marketing activities whilst these skills are transferred to people within our team.

#### **Deliverable Timescale**

We see this as being a project between now and the end of 2019.

#### **Indicative Budget**

Approx £20k

#### **Evaluation Criteria**

Quotations will be assessed and scored on the following criteria:

##### ***Quality/ Technical Merit (50%)***

Supplier must demonstrate they have the technical and professional capability to deliver the requirement.

##### ***Delivery Timescale (20%)***

Supplier must demonstrate they can deliver the requirement to timescales above.

##### ***Cost/Value for money (30%)***

Does supplier offer value for money. This will not necessarily be the cheapest quote.

### Scoring Methodology

4 Excellent	Proposal meets and in some places, exceeds the required standard
3 Good	Proposal meets required standard
2 Acceptable	Proposal meets the required standard in most respects, but is lacking or inconsistent in others
1 Poor	Proposal falls short of expected standard
0 Unacceptable	Completely or significantly fails to meet required standard or does not provide the relevant answer

### Proposal Format

Proposals should clearly demonstrate how they meet the requirement set out above.

### Deadline and Submission

Proposals are required by 5pm on Monday 11<sup>th</sup> February 2019 either electronically or by post/in person to Alan Woods of Woods Squared Limited, Unit 3 Prenton Business Park, Prenton Way, Prenton, Wirral, CH43 3EA or via email to [alan@woods-squared.co.uk](mailto:alan@woods-squared.co.uk).

### Date Published

Monday 28 February 2019

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### Conditions of Tender

- Please be aware that due to the relatively low indicative budget for this work (i.e. less than the current OJEU limits) there is no regulatory obligation for us to provide feedback if you are unsuccessful.
- We reserve the right to discontinue this tender process at any time and not award a contract.
- You will not be entitled to claim from us any costs or expenses which you may incur in preparing and/or submitting your Tender at any stage of this exercises. This applies whether or not your organisation is successful.