



**SCOTTISH GOVERNMENT**

**SP-16-010**

**FRAMEWORK AGREEMENT FOR THE PROVISION OF**

**DIGITAL MARKETING SERVICES**

**FORM OF TENDER**

## FORM OF TENDER TO THE SCOTTISH MINISTERS

The Tenderer hereby contracts and agrees on the acceptance of the tender by the Scottish Ministers acting through Scottish Procurement, to provide the services in the specified in Schedule 1 & 1A of the Entire Agreement in accordance with the Schedules, at the prices entered in the Commercial Envelope and the terms and conditions of this Framework Agreement.

The Tenderer undertakes to submit a tender in accordance with the following documents:

- Framework Agreement
- Schedule 1 Statement of Requirement and Service Levels
- Schedule 1A General Statement of Requirement
- Schedule 2 Pricing Schedule
- Schedule 3 Award Procedures
- Schedule 4 Management Arrangements
- Schedule 5 Standard Terms Of Supply
- Schedule 6 Parent Company Guarantee
- Schedule 7 Contractor Sensitive Information
- Schedule 8 Exit Management
- Schedule 9 Model Contract regarding Data Protection Directive 95/46/EC
- Schedule 10 Approved sub-contractors
- Form Of Tender

The Tenderer agrees to abide by this tender from the date fixed for receiving tenders until the award of the Framework.

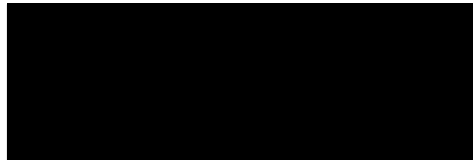
The Tenderer understands that the Scottish Ministers are not bound to accept the lowest priced tender or any tender and shall not be bound to use the Contractor as a sole supplier.

The Tenderer understands that the service provision is expected to commence on 1 June 2017, for a period of 48 months, and is expected to end on 31 May 2021 unless the Framework Agreement is terminated in accordance with the terms and conditions of this Framework Agreement.

Tenderer/Company: The Gate Worldwide

Name: [REDACTED]

Signature:



Designation: Managing Director

Date: 9<sup>th</sup> December 2016

## **TUPE**

Having taken legal advice it is our view that TUPE will not apply to the Framework Contract.

We recognise that it may apply once a call-off contract is awarded.

We have little current understanding of what specific work might be transferred to us through future call-off contracts. In the absence of full, detailed information from the existing agencies and the Scottish Government/Collaborative Partners, we are unable, at this time, to make any meaningful assessment of the likely costs or impact(s) of TUPE.

Our submission is therefore made on the assumption that TUPE will not apply.

## Digital Marketing Services – The Gate Worldwide – 2.2.3

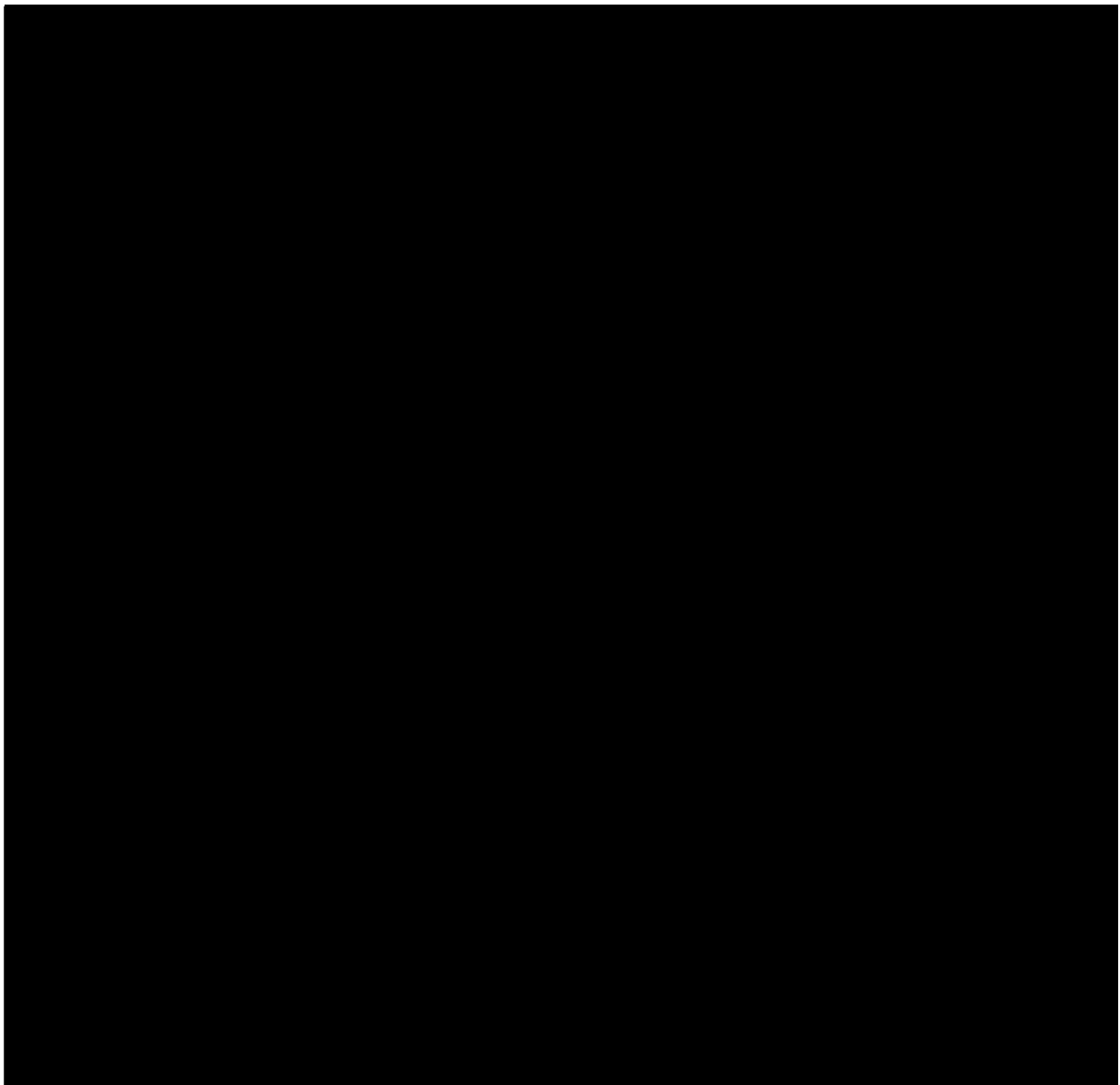
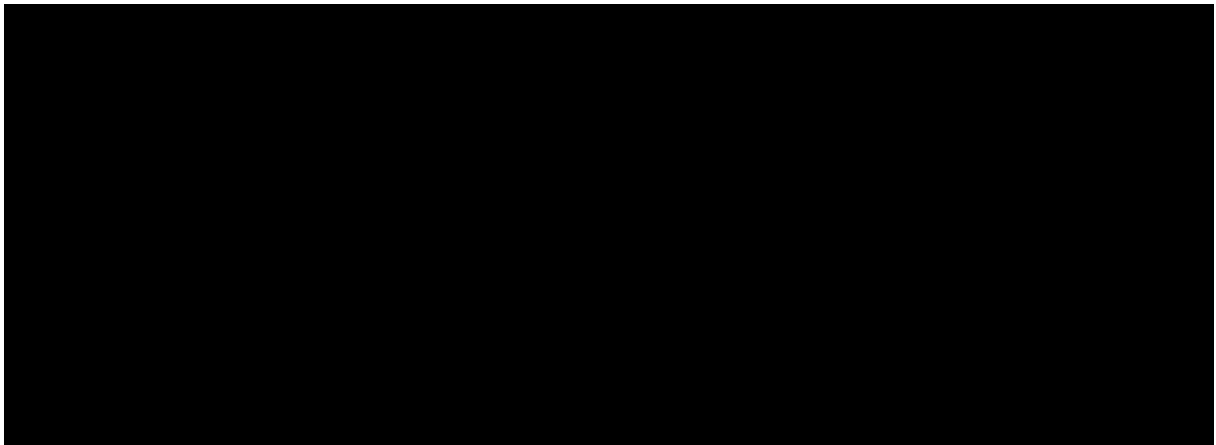
Please provide full details of how your organisation will ensure accurate delivery of the services detailed in Schedule 1 and Schedule 1A of the Entire Agreement. Within your response please detail how you will draw on your marketing and social marketing and technical expertise to achieve the services and where applicable, deliver behaviour change. Your response should highlight how you will draw on the following activities to deliver effective digital marketing activities in order to achieve and exceed the objectives of the Framework Public body.

- Digital marketing strategy and roadmap (including engagement strategy)
- Social media
- Data, segmentation and targeting
- Online lead generation, nurturing and scoring
- Content marketing and development
- Conversion optimisation
- SEO
- User experience and testing

Particular attention should be given to how your approach can be used and adapted to deliver a range of activities including:

- Digital marketing
- Search engine optimisation
- Partnership marketing

## Effective process



### Tuned to Frameworks needs

As we have been on the Scottish Government Digital Marketing Lot for the past four years, our process is also tuned to the needs of the framework. Our process is versatile and covers the wide range of services to be provided under this framework. It's rigorous but flexes to include different tools and techniques according to requirement.

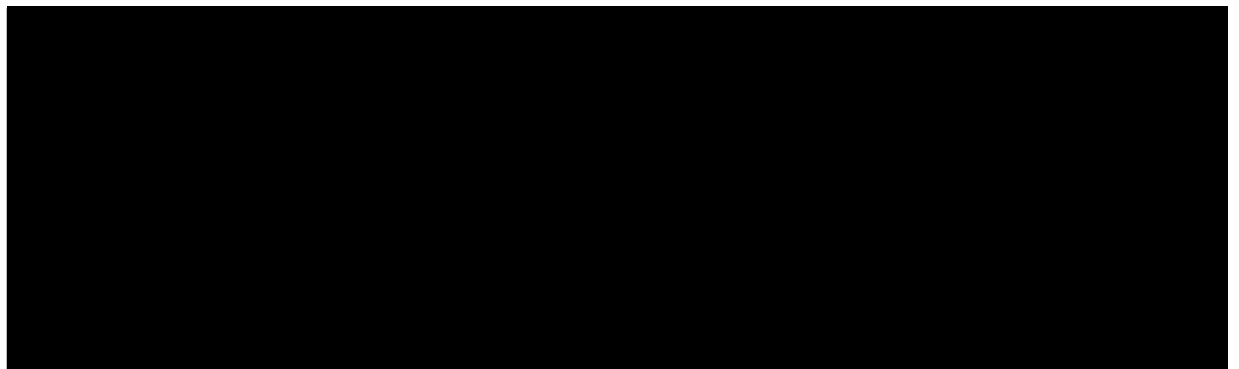
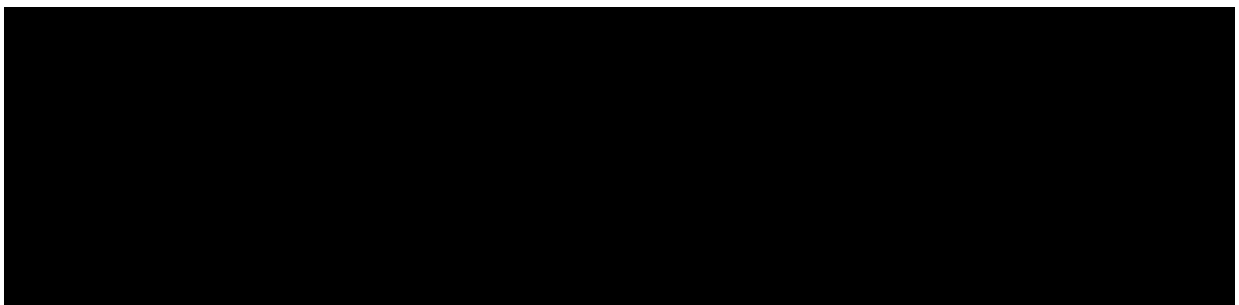
### Digital innovation

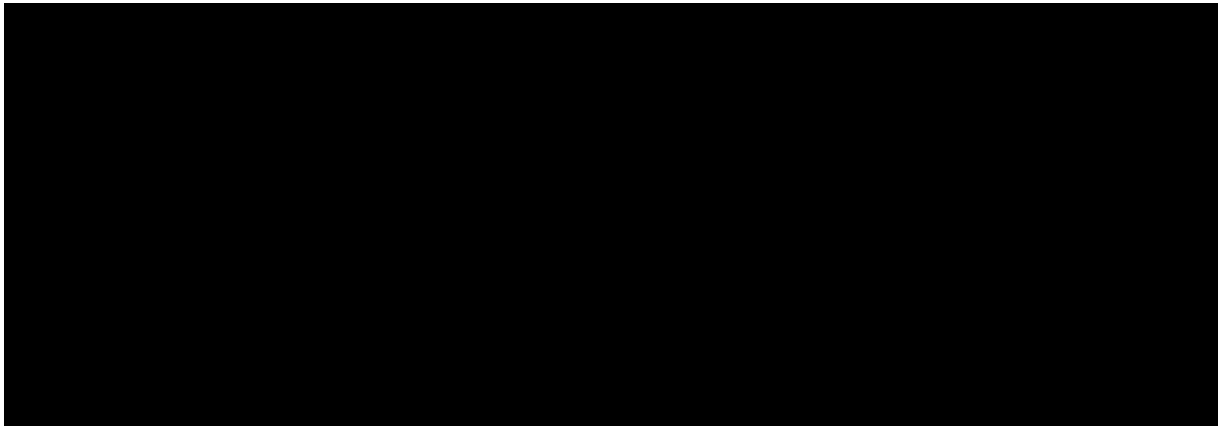
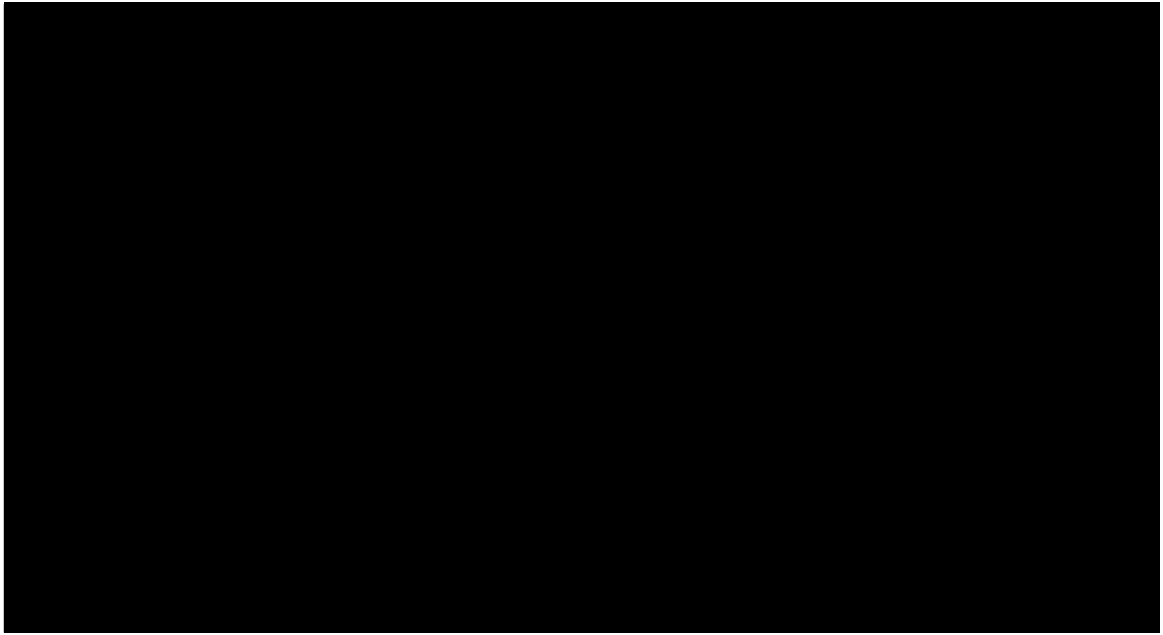
We pride ourselves on digital innovation, with a hard-edged focus on usability, performance and data, secure in the knowledge that we will deliver on time, on budget and on brief. Our team are capable of all aspects of digital marketing including: paid display, SEO, eCRM, social, design and build, Inbound Marketing, PPC, content creation, mobile apps/SMS.

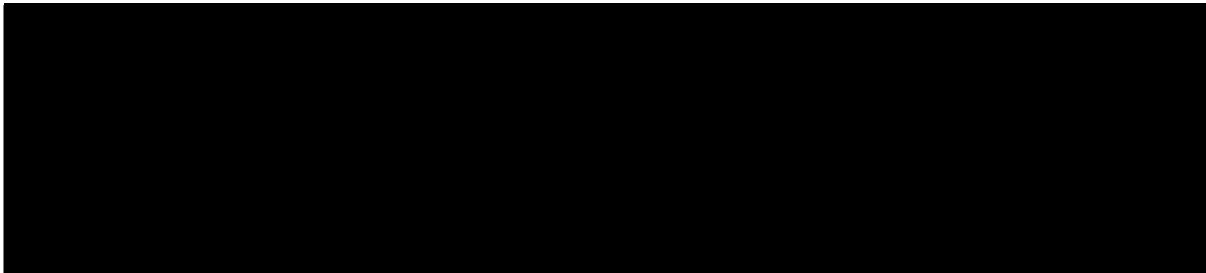
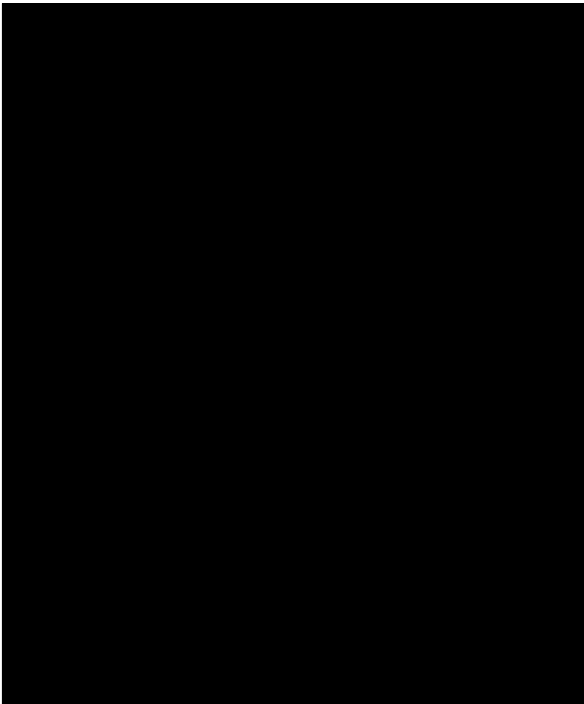
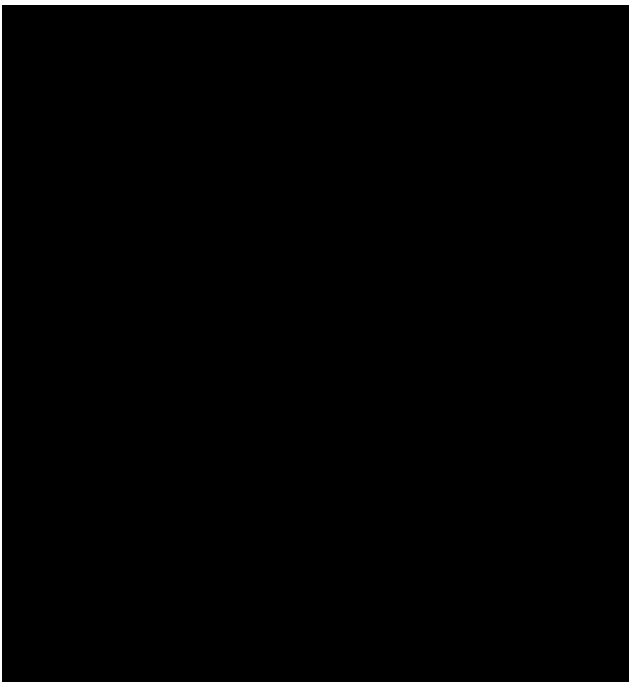
## Digital Marketing Strategy

The key to accurate delivery is a digital marketing planning methodology that is scrupulous and end-to-end. The output of the process will be the framework that guides channel choices and governs the implementation of digital marketing activity.

Accuracy is designed-in: every stage must demonstrate it. Our planning is where our agency exacts measurement, data and facts and then brings them to bear in order to trigger and stimulate accurate interpretation, deeper insight and creative expression.

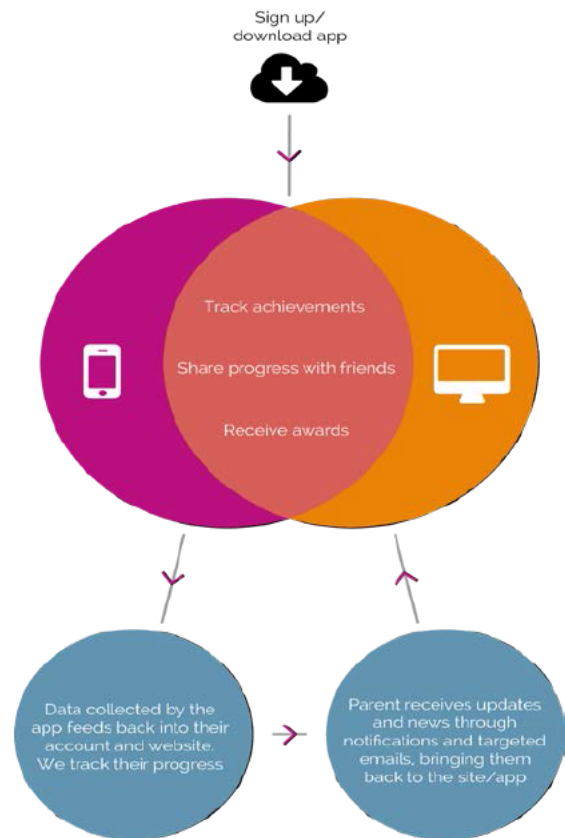




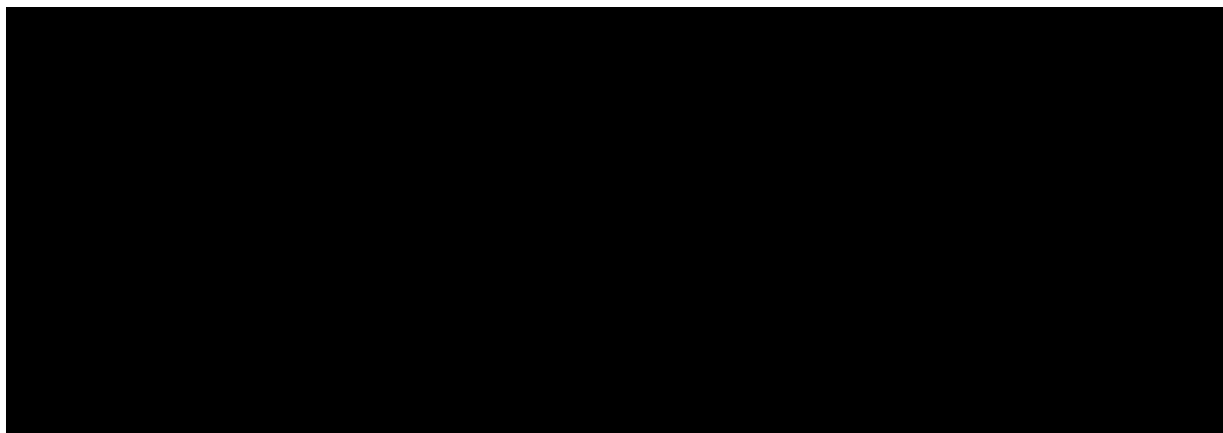
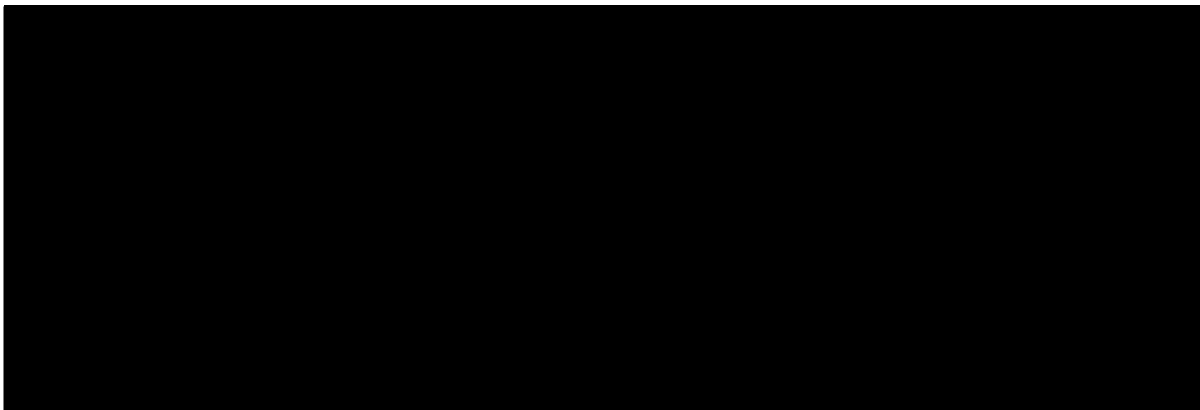
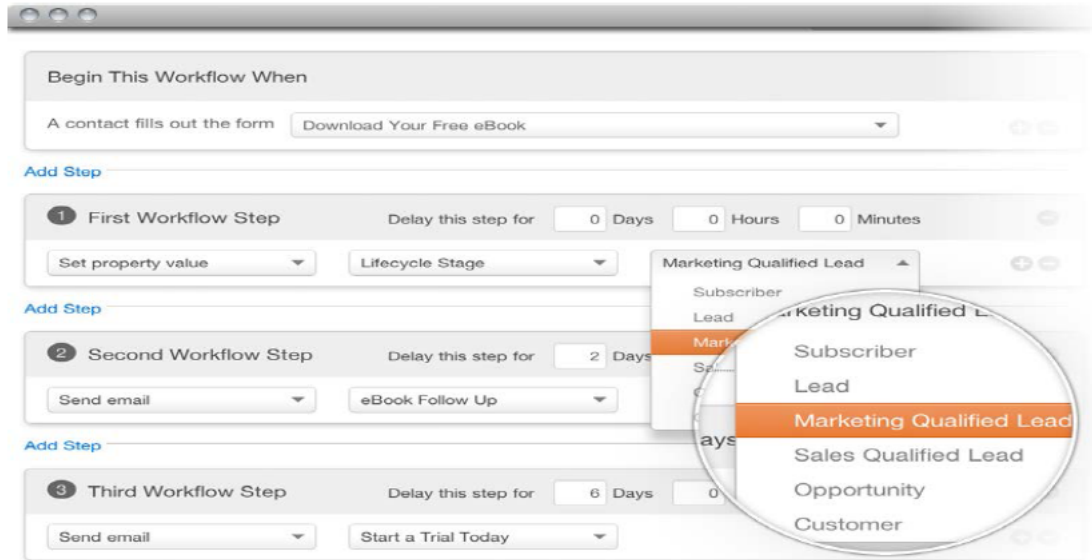




*Illustration 4. In our Play Talk Read behaviour change campaign, Nudge strategies are delivered through eCRM. We used insight to create a virtuous circle of behaviour with nudges, rewards and easy opportunities to share.*



*Illustration 5. We are Hubspot accredited and use automated in-bound content marketing tools as an efficient way to manage metrics and drive lead generation strategies on client campaigns.*





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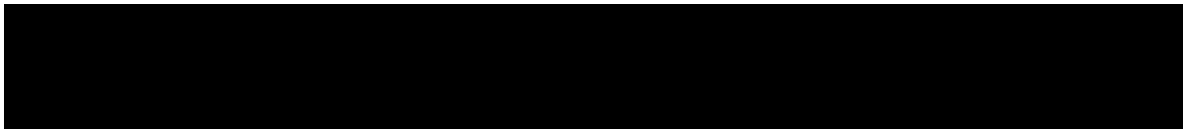
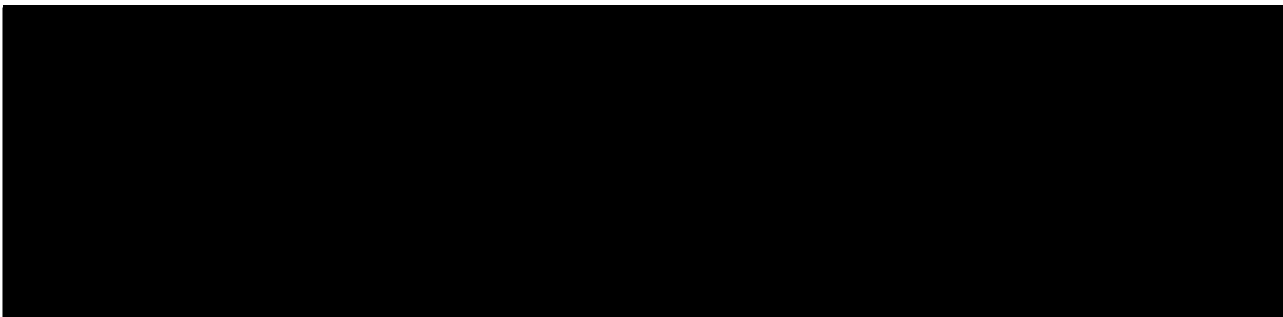
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## Digital Marketing Services – The Gate Worldwide – Question 2.2.4

Website Design and Development Services can include, but not be limited to, the following services:

- digital transformation of existing services;
- web based application development;
- mobile application design and development;
- desktop application design and development.

Please provide details of how your organisation will deliver website design and build services paying particular attention to the following:

- website development across multi-platform including standard desktop and mobile operating systems;
- how web based applications will comply with World Web Consortium (W3C) Web Accessibility Initiative Standards to WCAG 2.0 level AA (or any equivalents) and any future revisions;
- your organisations ability to use stylesheets (e.g. CSS) and coding standards using a formal grammar, (e.g. XHTML)
- how web based systems will be viewed using all major web site browsers including, but not limited to, Internet Explorer, Chrome, Safari, Firefox, Opera and Edge;
- your organisations use and experience of Open Standards and Open Source solutions;
- how your organisation would deliver and implement assistive technology requirements.

Tenderers must also provide details of any services which will be carried out by Sub-Contractors in relation to Website Design and Build services.



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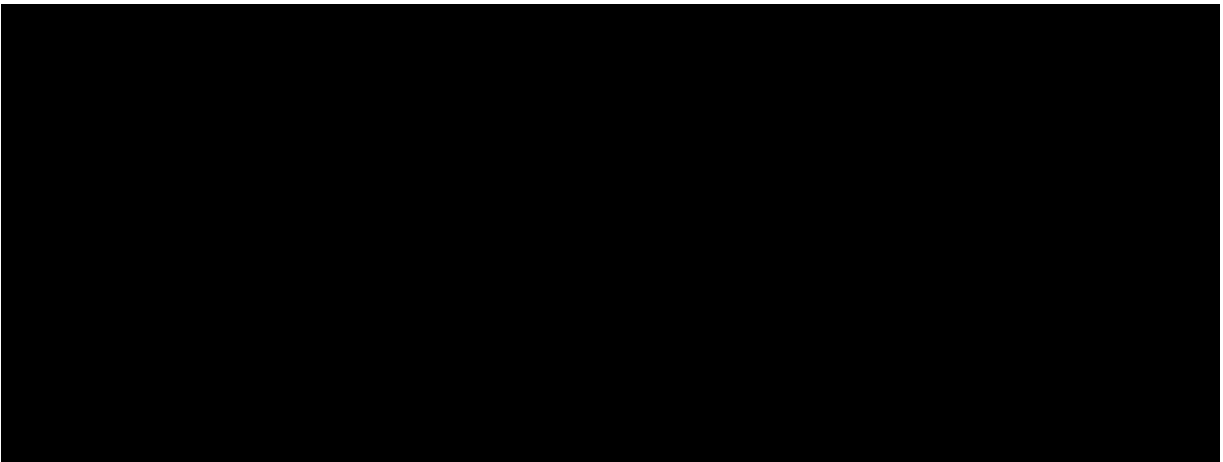
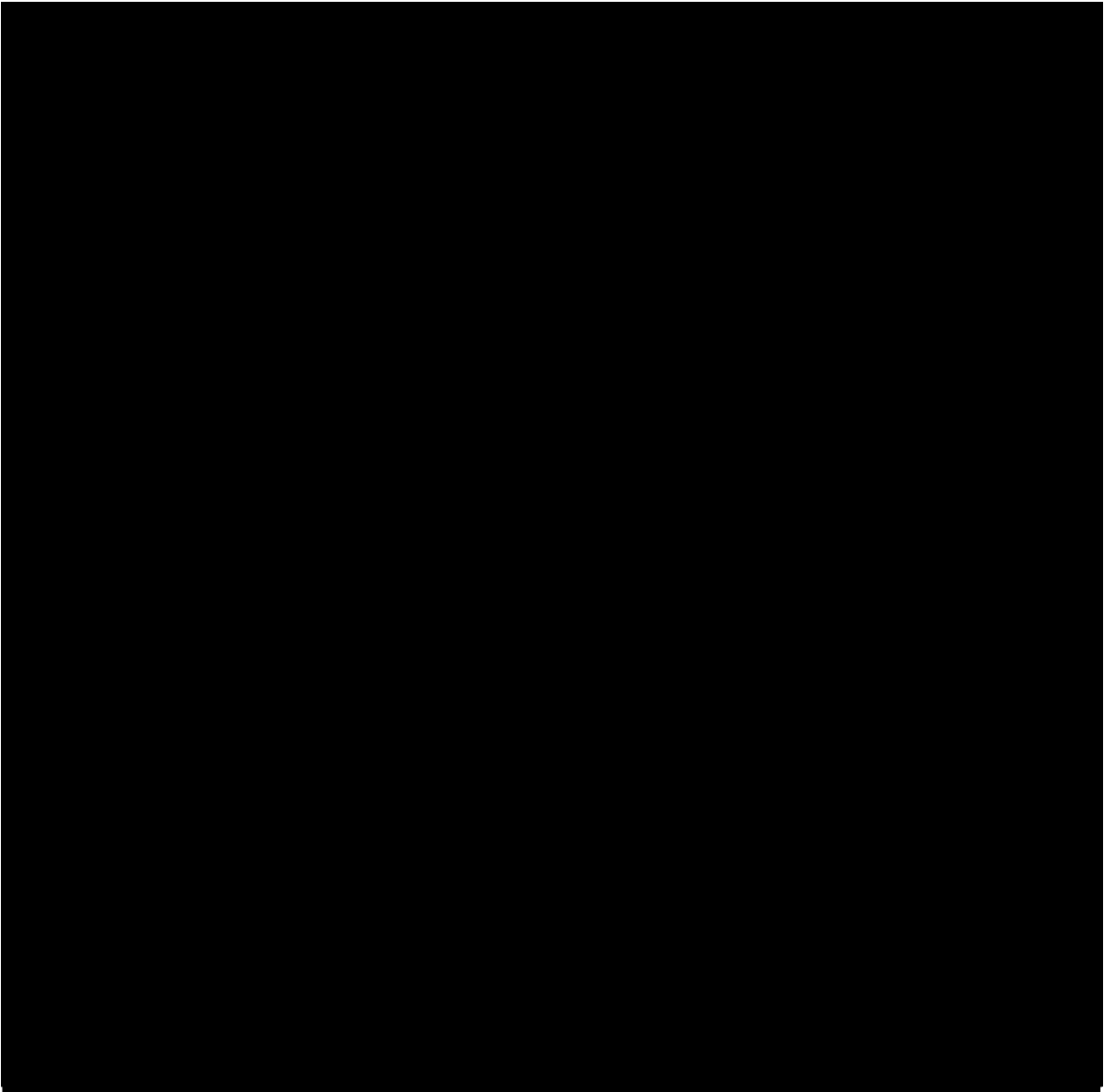
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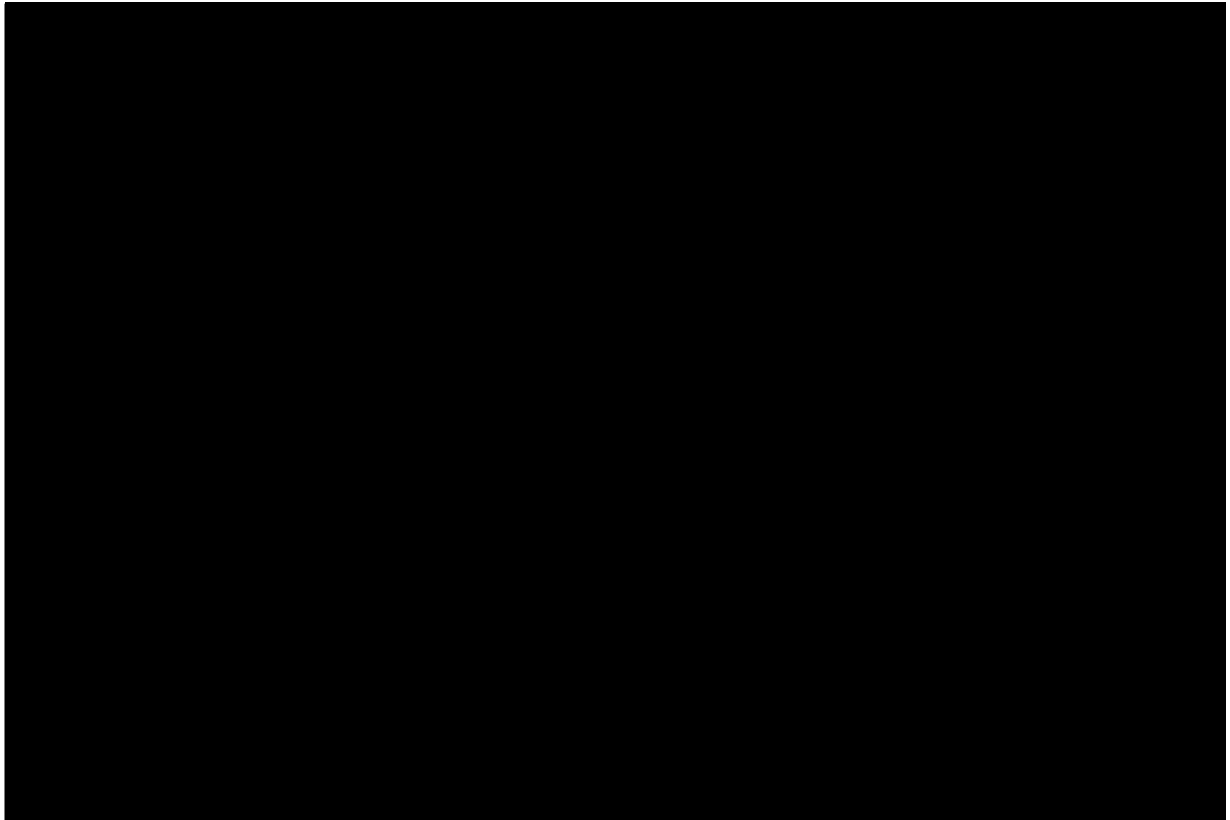
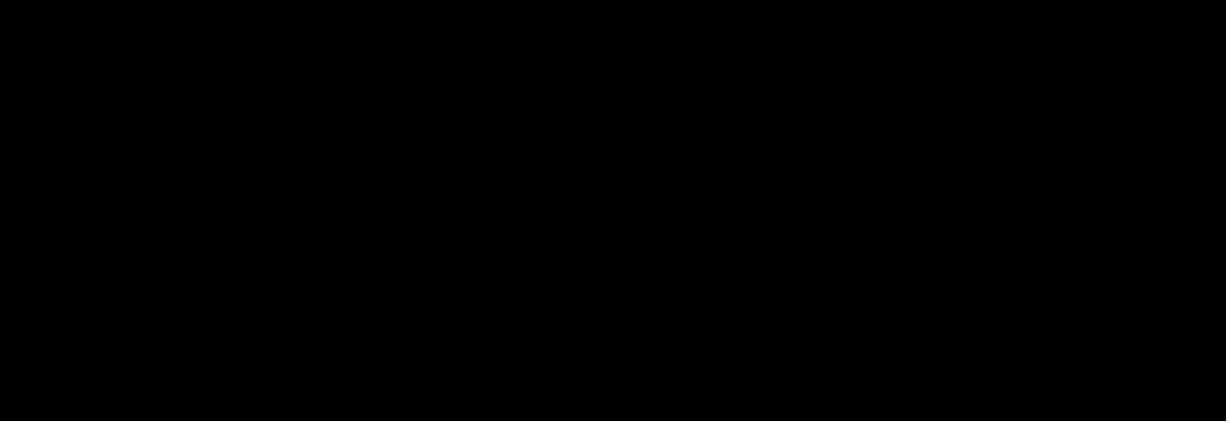
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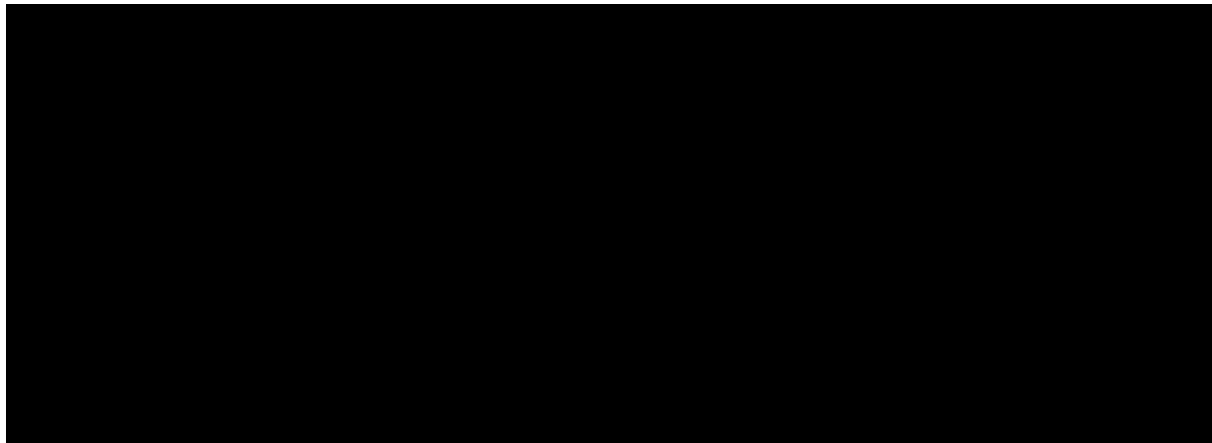
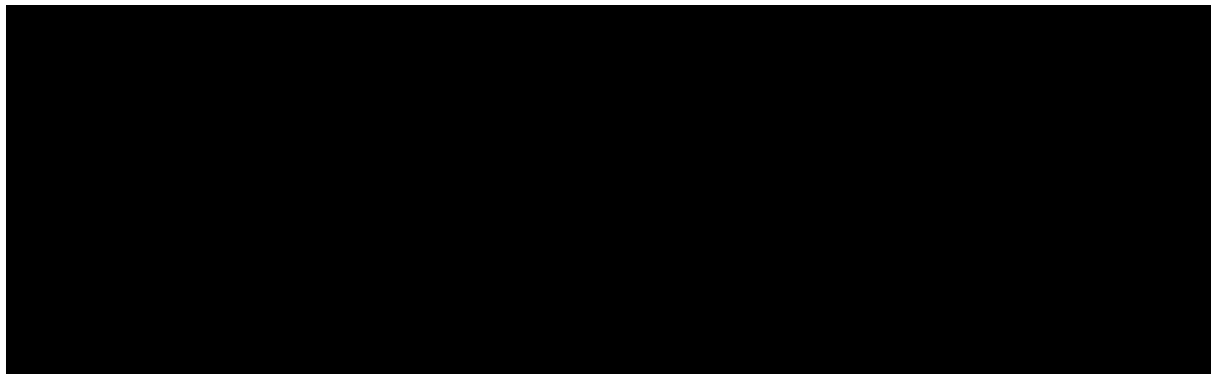
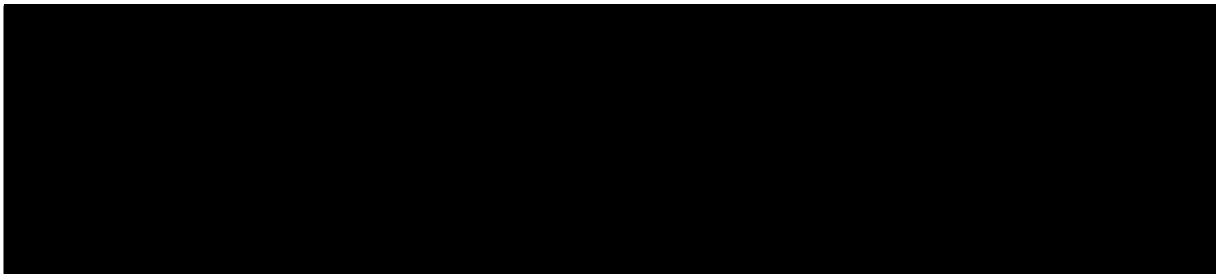
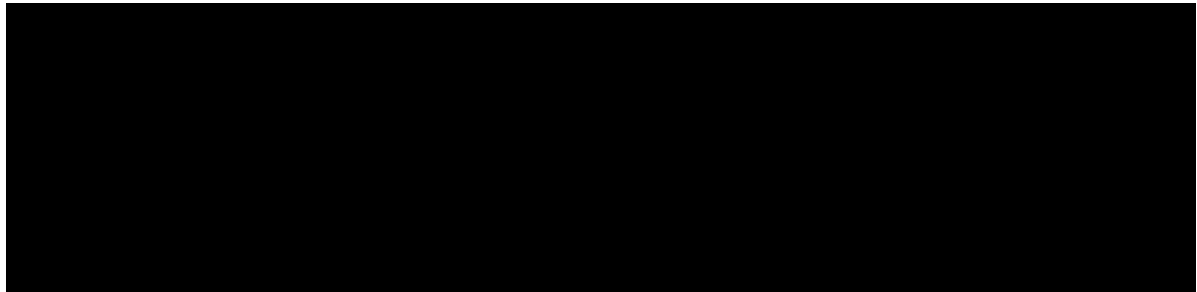


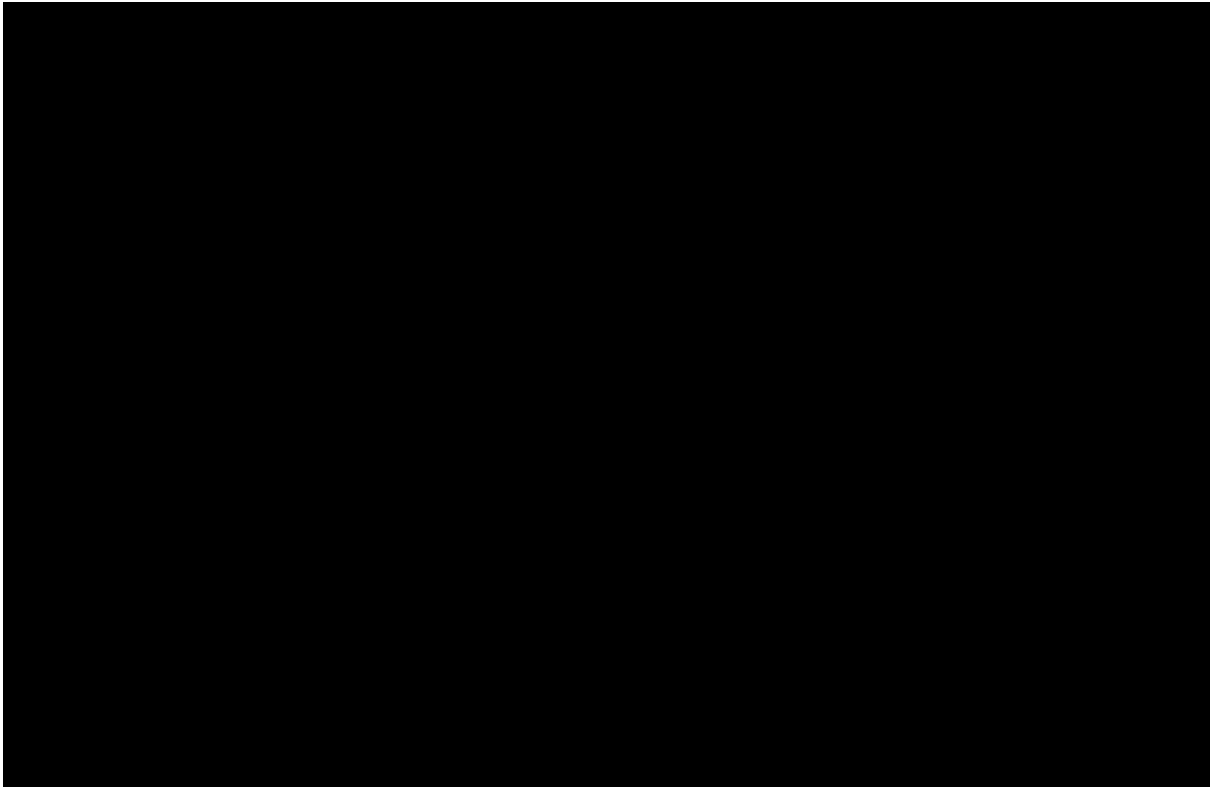
## Digital Marketing – The Gate Worldwide – Question 2.2.5

Please provide details of how your organisation will deliver website testing, paying particular attention to the following:

1. Details of how you will provide User Experience (UX) testing, providing information on user interaction with the application interface;
2. Details of how you will provide System Performance testing, to ensure the application is fit for purpose and meets the original requirements specification;
3. Details of how you will ensure that the application meets appropriate security requirements and provide assurance on the confidentiality, integrity and availability of the application and its data.
4. Tenderers must also provide details of any services which will be carried out by Sub-Contractors in relation to any of the website testing services.

Our approach to UX (User Experience) testing involves a user-centred design approach, not only during the initial discovery phase of the project, but also to evaluate the websites performance post launch if the scope allows.





## Digital Marketing Services – The Gate Worldwide – Question 2.2.6

Please describe your organisations approach on the provision of the following services by:-

1. Hosting Services: Providing details on how your organisation will provide website hosting services, (NB: at present Scottish Government have their own Hosting arrangement in place) paying particular attention to the following:

- security;
- networking facilities;
- documentation standards;
- compliance with ISO 27017 or equivalent;
- government security classifications;

2. Support & maintenance: - providing details on how your organisation will provide support services in relation to the core development, including performance analytics and management reporting;

3. Data migration:- providing details on your organisations ability to extract data from other systems including any common data formats used;

4. Security services:- providing details on how your organisation will provide security services directly related to digital applications, (e.g. secure website certificates, secure data storage and secure data transfer protocols).

5. Tenderers must also provide details of any services which will be carried out by Sub-Contractors in delivering these service requirements.

# Hosting Services

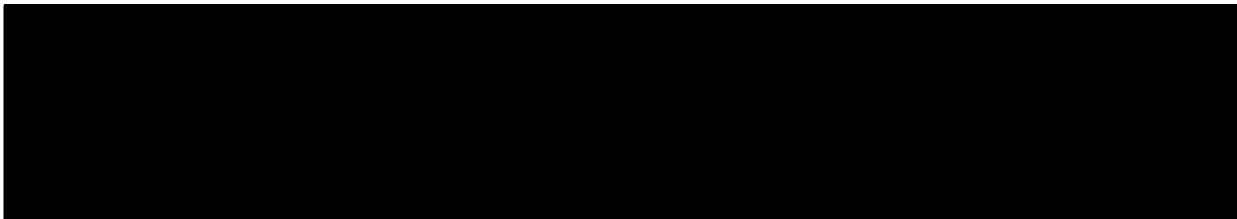
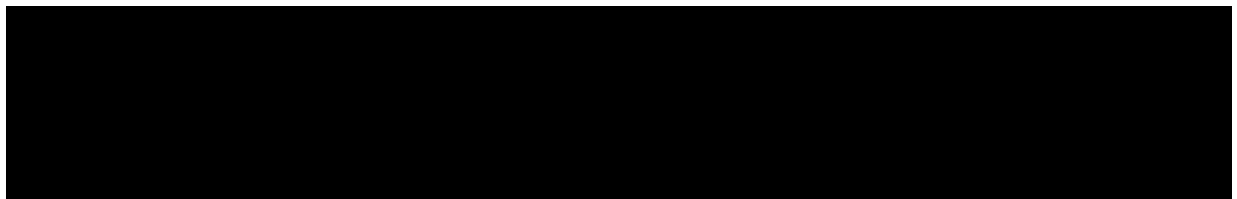
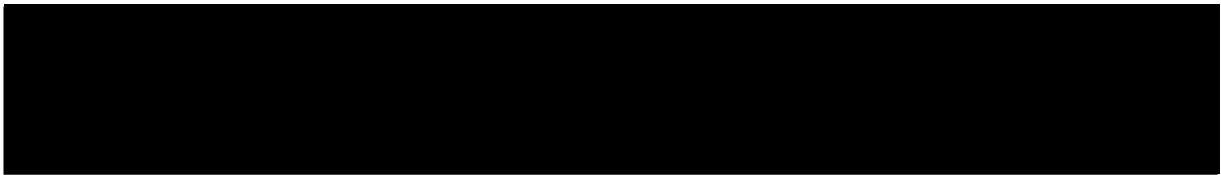
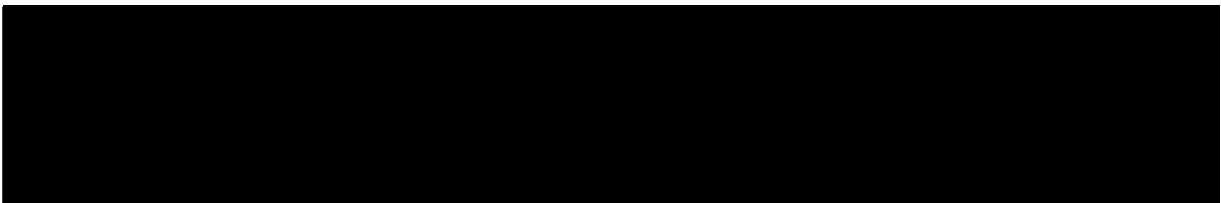
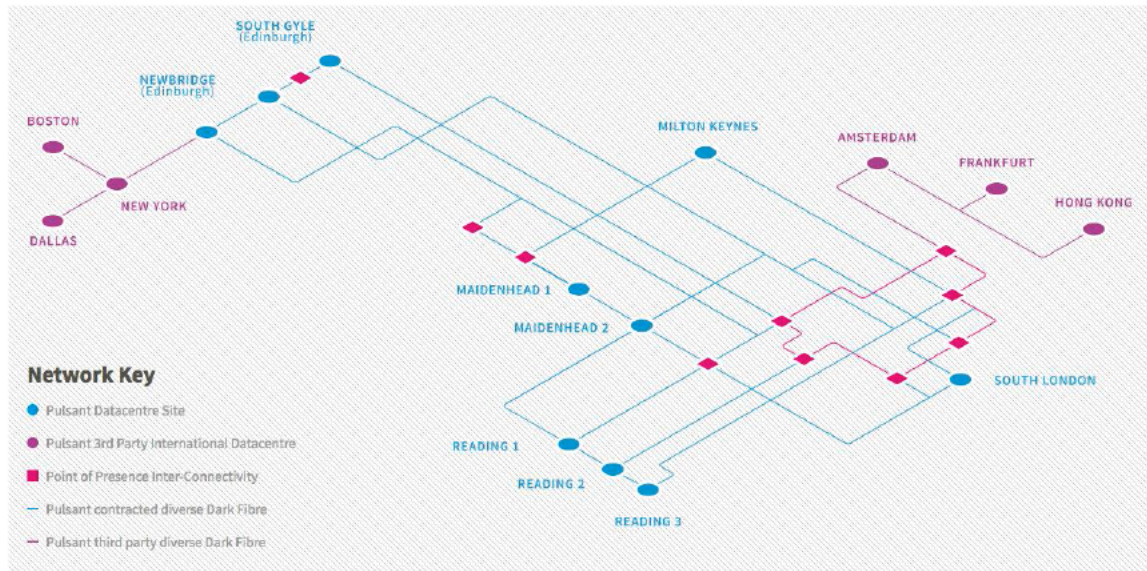


Illustration 2. Pulsant Datacentre Network Diagram





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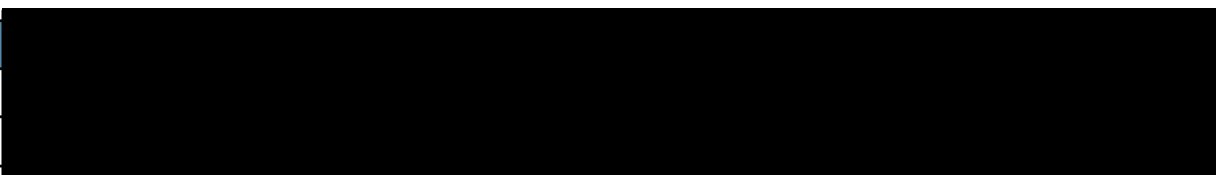
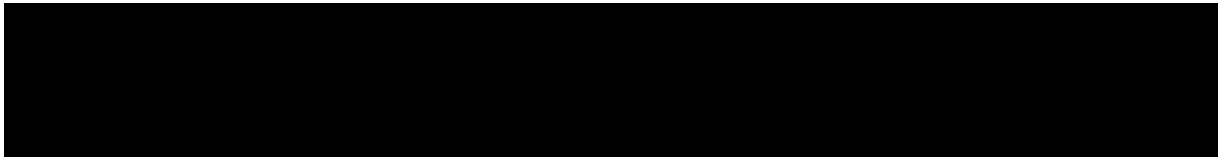
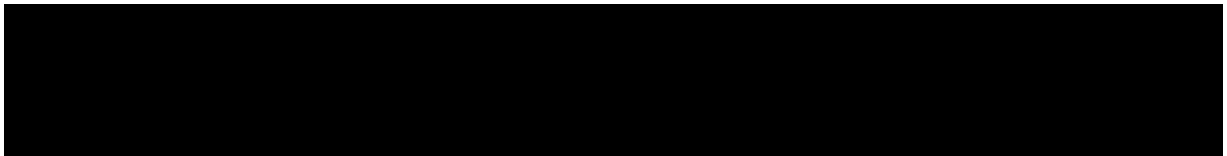
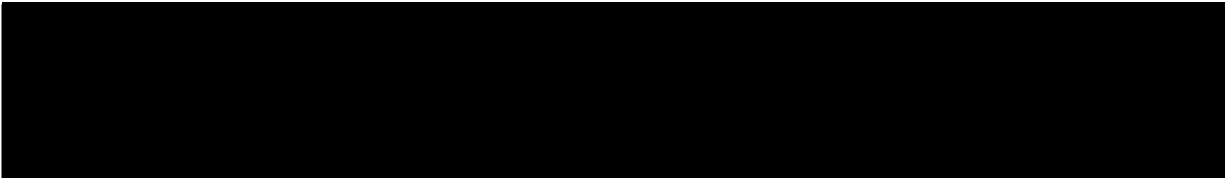
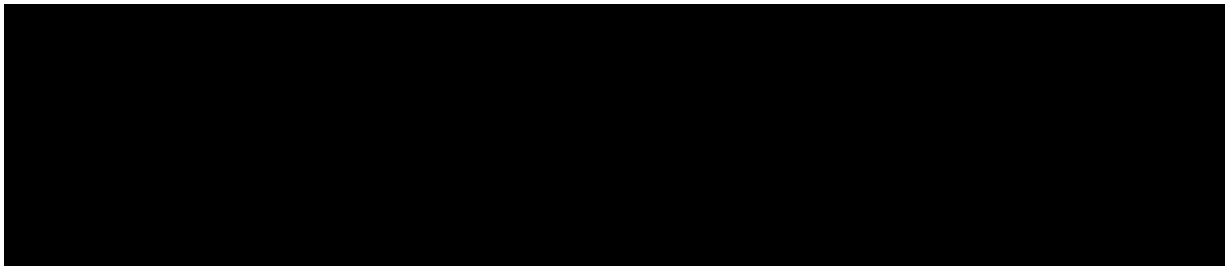
### Maintenance and Support Services:

We offer a variety of service levels with regards to website security maintenance and support services. All options include monthly core security patching, performance monitoring and optimisation services.

Hosting maintenance is automatically provided by our sub-contractor as part of our fully managed service. This ensures up time of 99.999%, with a service level agreement of a 4 hour response for all issues raised.

### Data Migration

Migration of complex data is either managed using automated mass extraction tools such as Siteport, or specific sub-contractors depending on specific project requirements. Our sub-contractor is Glasgow based [REDACTED]. Less complex data migration is handled using SQL tools, and manual migration.





## Digital Marketing Services – The Gate Worldwide – Question 2.2.7

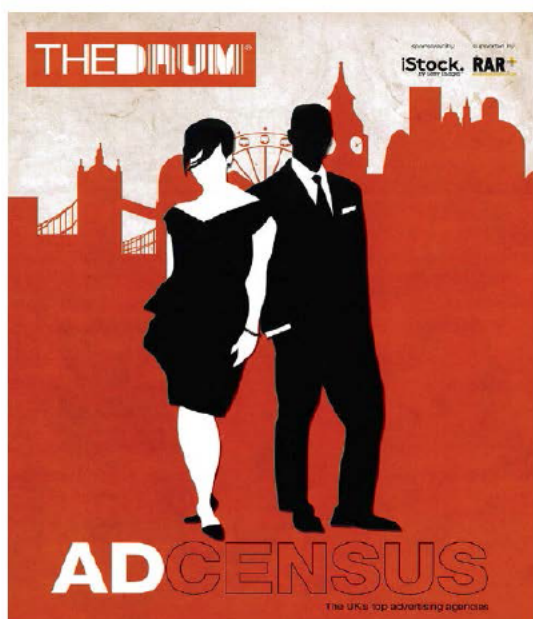
Please detail your organisation's plans for implementing a process of continuous improvement that will ensure that best practice is followed when delivering the service paying particular attention to the following:

How you will ensure staff are trained and developed in order to keep up to date with a Framework Public Body's organisation and culture, with best practice, market developments and emerging technologies, so as to provide a current and innovative service to Framework Public Bodies; and proposals to monitor and improve your on-going levels of service e.g. customer liaison/ satisfaction surveys and how this information will be fed into the continuous improvement process.

## Continuous Improvement

Our aim is always to deliver the highest standards of customer satisfaction and innovation to our clients. (Illustration 1). Continuous improvement is a core business objective, led from the top by our Managing Director. We have established multiple, connected processes to drive performance improvement and have embedded a culture of improvement, which

*Illustration 1. In 2015 we were voted No 1 in the Client Rankings in The Drum's UK Agency Census.*



CLIENT RANKINGS		PEER RANKINGS	
RANK	AGENCY	RANK	AGENCY
01	<b>THE GATE WORLDWIDE</b>	01	DDB UK
02	COGENT ELLIOTT	02	ABBOTT MEAD VICKERS BBDO
03	MCCANN UK	03	WIEDEN+KENNEDY UK
04	INTERMARKETING AGENCY	04	OGILVY & MATHER GROUP
05	LAWTON COMMS	05	GREY ADVERTISING
06	HOME	06	SAATCHI & SAATCHI
07	GRATTEPALM	07	VCCP
08	HPS GROUP	08	KARMARAMA
09	B.J.L. GROUP	09	DLKW LOWE
10	BIG COMMUNICATIONS	10	JWT GROUP
11	BRASS	11	BROTHERS & SISTERS CREATIVE
12	WIEDEN+KENNEDY UK	<b>12</b>	<b>THE GATE WORLDWIDE</b>
13	TANGIBLE UK	13	TBWA LONDON
14	LOWE PROFERO UK	14	FALLON
15	PUBLICIS LONDON	15	HAVAS WORLDWIDE
16	PROXIMITY LONDON	16	CHI & PARTNERS
17	BRAY LEINO	17	MCCANN UK
18	DLKW LOWE	18	MOTHER LONDON
19	TBWA LONDON	19	M&C SAATCHI
20	BBDO	20	PUBLICIS LONDON

underpins our entire service offering.

### Continual Professional Development (CPD)

CPD is part of our culture. All staff have formal development plans, reviewed twice yearly in line with specific roles and responsibilities, but also client need and feedback. This ensures expectations are met and standards constantly driven up. Our CPD programme is audited and accredited annually by the Institute of Practitioners in Advertising (IPA).

Our industry memberships (IPA, DMA, Marketing Society and IoD), allow us to benefit from training, research and benchmarking. This ensures we are at the forefront of best practice and can apply this on behalf of the Scottish Government [SG].

We also subscribe to the National Social Marketing Centre, using their tools and training to develop our thinking and our staff.

## Benchmarking

Benchmarking is an important part of our improvement process. We benchmark against industry peers and best practice, against quality, time, cost and service in order to continually evaluate processes and improve performance. This is facilitated by our memberships and position within a wider communications group. We also use management information across framework clients to benchmark performance, ensure consistent service and drive improvement.

## Individual client inductions

To ensure staff have the best preparation for working with individual clients, we run induction sessions that provide detailed background on client organisations, past campaigns, key current issues and broader policy context. We also draw on best practice and professional standards from HMG as well as SG.

We have in place a regularly-updated, online knowledge bank that contains intelligence on SG and the main Public Body partners. It draws on subscriptions, news dashboards and twitter feeds and includes policy, corporate plans, communications activity, brand guidelines and relevant press articles or papers.

We encourage work-shadowing, work placements and secondments as important ways of understanding organisation, issues and culture.

## Service Level Agreement (SLA)

At the outset of a contract we will put in place a tailored SLA. By setting clear guidelines and KPIs we ensure we have in place a measurable framework for service delivery and a clear understanding of each individual framework clients' expectations.

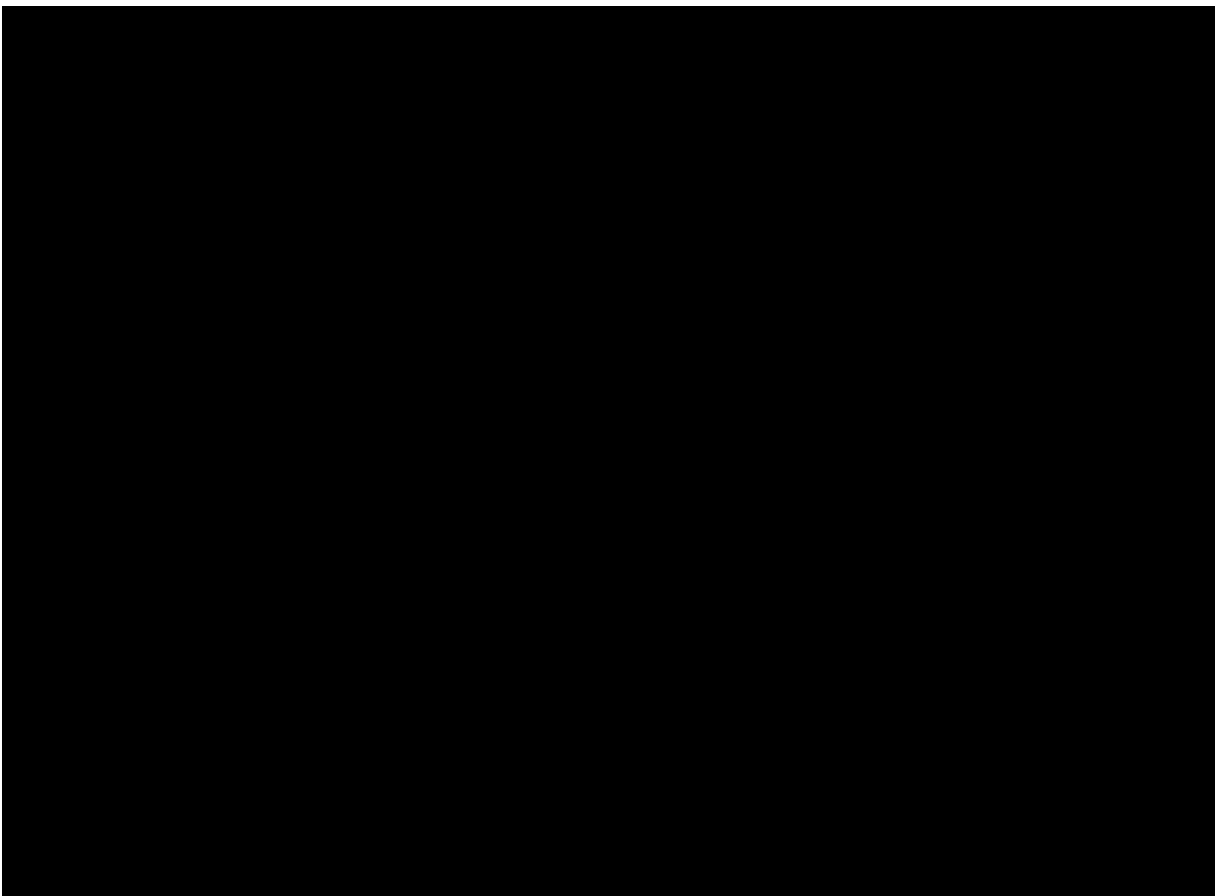
## Previous learnings

We always look to maximise the benefits of previous learning at a project outset. We surface insights from previous campaigns and look internationally for insight or best practice. For example, we recently looked to the US to inform early years' strategy, to Australia for road safety innovation and Sweden for Land Registration.

We share best practice, technology and market developments with our clients through trend updates, white papers and events. Our True, Good and Beautiful event in Edinburgh last year had speakers from Google, Linkdex, CommsLab and Pinterest.

### In-flight reviews and reporting

Throughout engagement, we ensure regular project reviews, performance reporting and informal feedback interfaces are in place. These ensure performance is constantly monitored and that KPIs are being met. This allows for 'test and learn' opportunities to optimise campaigns 'in-flight' and identify improvements. All feedback is recorded and actions taken, whether they be change to process, behaviour or quality control.



### Formal reviews and satisfaction surveys

At the end of any major campaign/engagement we run a post campaign review. This covers core objectives, approach and process and seeks to identify both best practice and future improvements. We capture and report all of these for future reference.

We also have a formal agency evaluation process, conducted twice a year with each client, which includes qualitative feedback across key service areas, as well as quantitative assessment against service measures and KPIs. We evaluate strategic awareness, communication and service, innovation and creativity, as well as overall value for money, and specifically aim to identify skills and capabilities that could be developed to better service the client. The process and documentation is validated as 'best practice' by both the IPA and ISBA.

## Continuous improvement

By continually monitoring, measuring and reporting every aspect of performance; from service delivery to efficiency, cost and value, quality, and client satisfaction, we constantly seek new ways to optimise performance. In every campaign there are opportunities to 'test' and 'learn'. There are always ways we can improve the way we deliver. And, with new technologies, there are more and more opportunities for innovation. With the aim, as always - to deliver the highest standard of customer satisfaction, innovation and output.

## Digital Services – The Gate Worldwide – Question 2.2.5

Please provide details of how you will ensure that sufficient capacity exists at all times to deliver the Framework, including Framework transition and periods of high demand, and how you will ensure that there is a consistent level and appropriate quality of service provided to Framework Public Bodies, regardless of spend or geographical spread across Scotland.

## Capacity and resource

The Gate have a total agency resource of 64. This resource, along with a team-based approach to delivery and, effective resourcing systems, means we are confident we can ensure sufficient capacity at all times to effectively deliver the framework. To ensure capacity we try and resource plan to allow for [REDACTED] capacity at all times

### Existing framework supplier

We currently provide services on the Scottish Government Marketing Services Framework for Digital Marketing. This means we have:

- Resources already in place to meet Framework needs
- A good understanding of its fluctuating needs
- A track-record of consistent and effective delivery across all services
- Significant resources already committed to the Framework
- A team that can hit the ground running making Framework transition easier

### Group resource

As part of a group of communications agencies, we are in a position to call upon the specialist wider group resources of our sister digital agency TwentySix Ltd who have an additional [REDACTED] staff. This is a long established, legal entity, with tried and tested processes for working together and a history of delivering together for clients.

The table below shows available resource which can be called upon to support delivery.

RESOURCES WHICH CAN BE CALLED UPON
[REDACTED]

## External support

We have in place a solid list of regular and reliable freelance and contract partners across all business areas that can support in periods of high demand. All are well vetted against a range of criteria. In the delivery of field marketing, where flexible and ad-hoc support is often required, we will work in partnership with a sub-contracted delivery agency.

## Recruitment

Should longer term resource be required, that cannot be covered by those existing, we will recruit to ensure sufficient capacity is available.

## Resource management

Managed by our Traffic Manager, our project management system supports detailed resource planning, allowing us to plan, monitor and manage workloads, resources and capacity effectively.

## HR procedures

- HR procedures also support consistent resource supply and service levels:
- Three or six month notice periods for key staff
- Detailed induction programmes for new staff
- Holiday procedures to avoid clashes
- Procedures for covering absenteeism for ill-health
- The latest best practice for maternity leave and parental support

## Service Levels

We aim to provide consistently exemplary service to all our clients, regardless of size, spend or geography. We do this through the following:

### Board level responsibility

The Gate's Managing Director will act as contract lead across all clients using the Framework. This means consistent senior responsibility for management of service delivery across all organisations. She is responsible for the allocation of adequate, named and suitably experienced staff to each framework client.

### Service Level Agreements (SLA)

Every framework client we engage with will have a SLA in line with contract requirements, but allowing for tailored needs, particularly in relation to response times and out of hours access. This supports consistent service level benchmarking and evaluation.



### **Consistent Processes**

Processes and client inductions will be applied consistently across every client. The same level of project planning, risk management, internal governance, project reporting and project review will be applied across all contracts.

### **Performance review**

The same agency performance evaluation process will be applied to all partners with the same frequency, ensuring regular like-for-life measurement and benchmarking of service delivery.

### **Awarded for client service**

The Gate has been recognised, (voted by clients), for its outstanding client service with the “Best Client Service” award at the Recommended Agency Register Awards in 2015.

## Digital Marketing – The Gate Worldwide – Question 2.2.9

Where a Framework Public Body has an urgent or emergency requirement, please provide, in detail, your structure for accommodating unforeseen requirements of this nature and your proposed formal processes to initiate such activity.

## Advance planning

Advance planning and protocols will ensure that we, (and our suppliers) are prepared to respond if a Framework Public Body has an urgent or emergency requirement. At the outset of any engagement we will agree and document protocols for urgent work and emergency response. These will provide a full and clear description of the action plan for each client and give the agency a roadmap to ensure a quick and effective response.

With a track record of over 12 years on the Framework, during which we have handled many urgent requests and emergencies, we have every confidence in our structures. That said our processes are being continually refined over time, and re-tried and re-tested.

## Structure

In the case of an urgent or emergency requirement, The Gate will depend on a number of individuals to coordinate a response. These individuals will come from the existing client agency team. They will be supported in full by members of the broader agency team and our wider UK group of over [REDACTED] people, if additional resource is required. To ensure availability to respond to urgent requirements we maintain [REDACTED] capacity within each team.

The structure and responsibilities of the response team can be seen below:

- **Response Lead:** The Managing Director for emergency requirements or Client Services Director for an urgent request. The Key point of client contact assesses the situation, agrees action required, coordinates and directs the agency response and provides overall direction for the response from the agency
- **Account Director:** Support in directing and organising response, primary point of contact with partner agencies, responsible for communication of requirements and distribution of critical information to agency response team. Monitors activity, delivery and expenditure and undertakes response risk assessment
- **Strategic Lead:** Advises on and makes strategic and tactical communication decisions, including recommended communications plan, public information requirements, messaging
- **Emergency Manager:** Support in organising and implementing response, ensuring deadlines are met, risks mitigated and quality service delivered

- **Creative Communication Lead:** Oversee the writing of messaging and public information, development of communication materials, public information radio scripts, online information, social media feeds etc
- **Production Manager:** Oversee the coordination of external suppliers, and the acquisition of any necessary production or media distribution services such as recording studios, voice over artists, print, field staff requirements
- **Technical/IT:** will provide technical support and co-ordination in the event of a major disaster and coordinate an off-site communications response centre if required.

### Response initiation

When a need for urgent or emergency work is identified by the client, they will activate the team by calling the Lead Contact. In the event of holidays or other unavailability the Lead will be on a rota and will direct to the named Account Director as secondary contact.

The precise role and requirements of The Gate team will vary depending on the nature of the requirement, but the Response Lead will assemble and coordinate the necessary team in line with requirements and agreed protocols.

In an emergency we would commit to having the team activated within an hour and assembled within three hours. If the requirement was within working hours the team could be assembled within 1.5 hrs.

### Process

In most cases the agency team would aim to follow a normal campaign or production process, allocating the same percentage of time to each stage but to an agreed fast-track schedule. In an emergency response we also recognise, that some stages such as formal research, may not be possible/needed. The process below would be used:

- Assess the situation
- Establish the requirement
- Resource the need
- Plan the action
- Deploy the team
- Monitor the situation
- Review and report the outcome

### **24 Hr access**

In case of out of hours' requirement, we will provide full contact details of named team members at the outset of any contract, including email, direct dial, mobile, and out of hour emergency phone numbers. This will ensure that the client has full access to the team at all times by phone and email.

### **SGoRR familiarisation**

We recognise that structures and guidelines are already in place to ensure that Scotland is prepared to respond to major emergencies. We see it as our role to familiarise and plan within these in the event of a major emergency and are happy to participate in scenario testing to ensure processes are effective.

### **Business continuity**

Should there be a requirement for the re-location of any of our clients because of an on-site emergency at their offices, we would be happy to provide such support. We have in place detailed business continuity plans to deal with such scenarios across our group and we have the technical capability and space to extend this to clients.

## Digital Marketing – The Gate Worldwide – Question 2.3.2

Account Management - Please provide a detailed breakdown of your proposed Account Management delivery, to include all disciplines relevant to the requirements as set out in Schedule 1 and Schedule 1A of the Entire Agreement, paying particular consideration to the following;

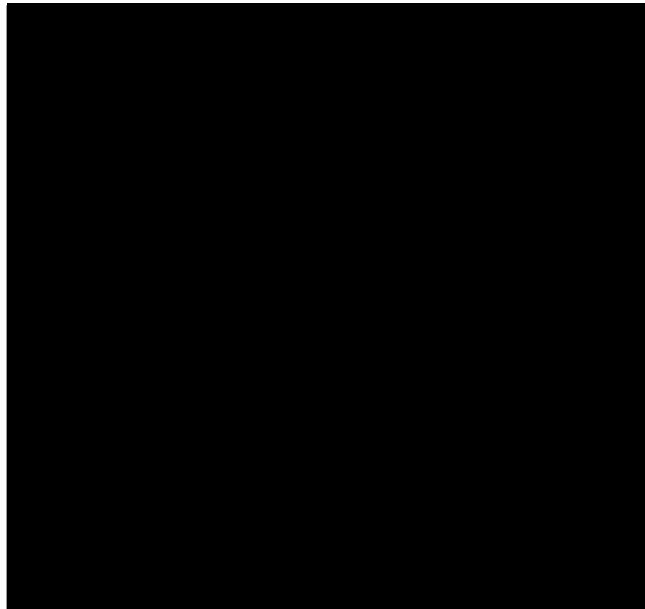
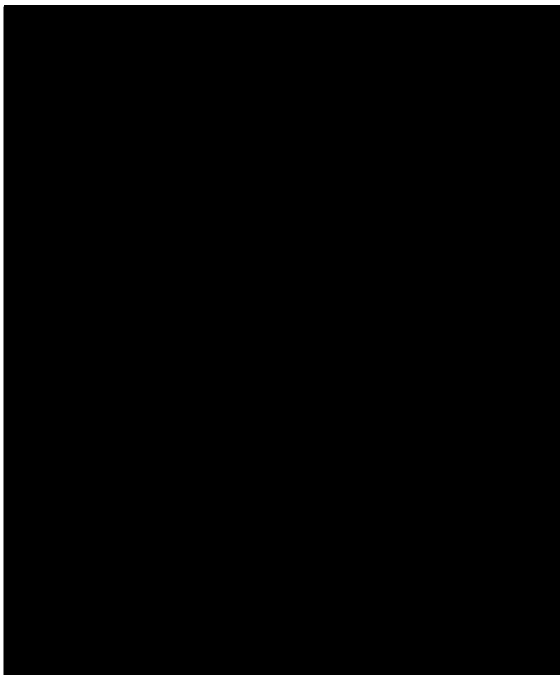
- detail how the services will be delivered and managed for all geographical locations, along with an account organisational structure for providing the service; (This must clearly demonstrate the Tenderer's senior management hierarchy and the names of key senior and account management individuals involved in the delivery of the services;
- provide CV's detailing the senior management staff's experience relevant to their role in the contract, key skills, awards and accomplishments in the Creative Advertising sector);
- details of the support staff who will be responsible for administering the Framework, their roles and reporting lines;
- mechanism for approval of any change to the above;
- the contingencies in place to work out with normal working hours as required and to ensure business continuity in the event of absenteeism through holidays, sickness or key personnel leaving;
- details of formal internal methods of interfaces between the Account Manager(s) and other internal staff within your organisation; how internal standards and monitoring of approvals/sign-off are managed and communicated internally/externally;
- details of complaints procedure and escalation process including where the Account Management Team are unable to resolve complaints satisfactorily or within agreed timescales; and
- training/development and monitoring of performance of the Account manager(s).

## Account Management

We recognise the significant and potentially complex delivery requirements of this Framework and the need for exemplar Account Management (AM) to help deliver it.

The Gate directly employs over [REDACTED] people. We are a fully integrated operation, with specialists across each of the service disciplines, supported by a multi-disciplinary and suitably experienced account management team.

We take account management extremely seriously. Account managers are the first point of contact for the client and the client anchor within the agency - the strategic, creative and brand guardian. Their aim is to add value at all times, to deliver a pro-active, strategic service and to ensure the smooth running and effective delivery of our client work – on brief, on time and on budget.



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*The Gate's account handling team were awarded the top award for account management (as voted by clients) at the Recommended Agency Register Awards (RAR) in 2015.*

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