

**Question 2.2.3 (Word Count 1800 – Whitespace response: 1798 words)**

*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*

## **Introduction**

With over seven years' marketing, social marketing and technical expertise on SG Frameworks, we ensure all projects contribute to SG's purpose: *'creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth.'*

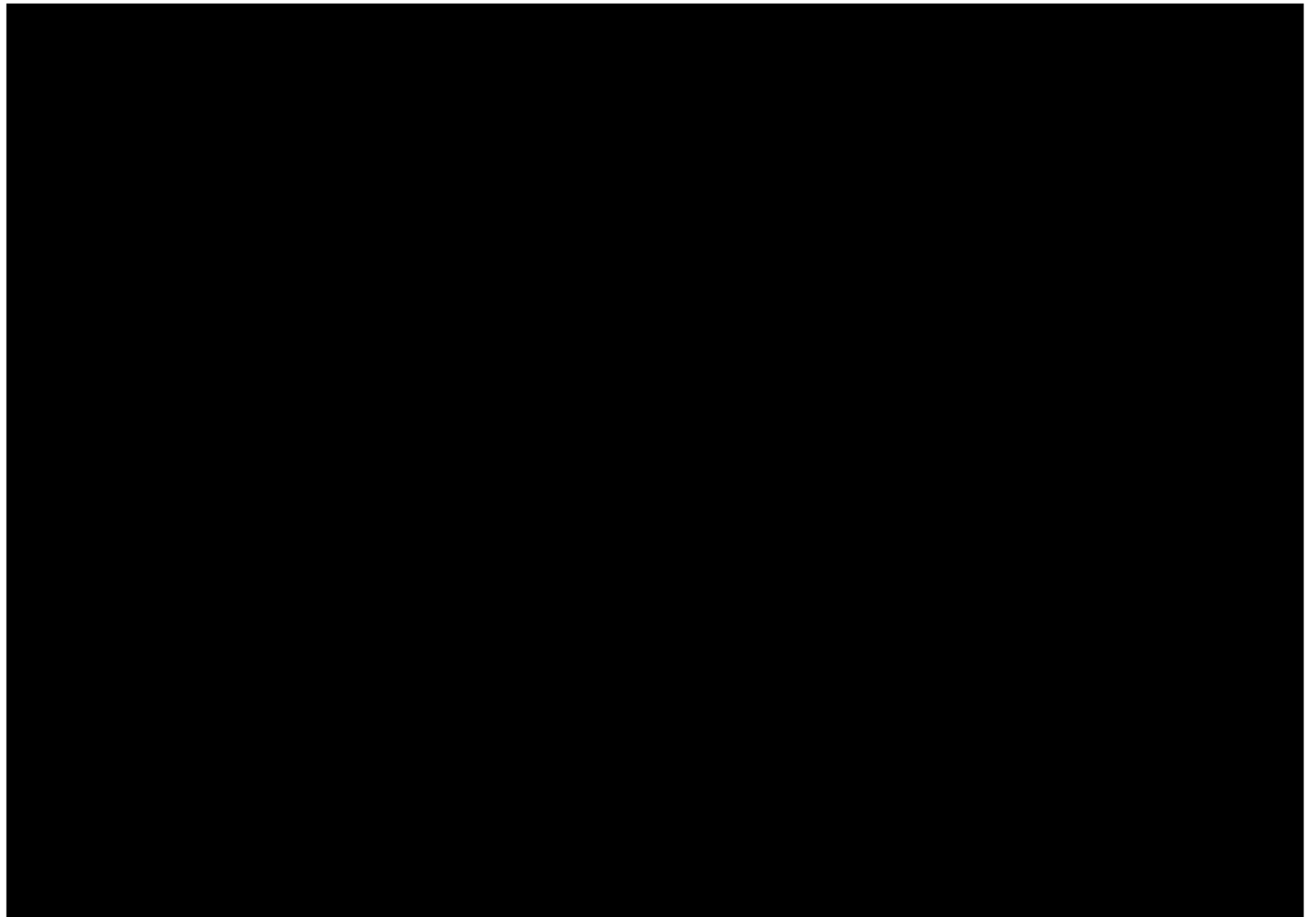
We will support and evidence by delivering:

- **Public Body projects:** meeting objectives supporting the National Performance Framework e.g.:
  - public information
  - social marketing
  - commercial
- **Best practice:** knowledge sharing e.g. research/innovation
- **Embedded principles in our own organisation:** our ambition for sustainable growth

Our Digital Marketing Process accurately delivers objective-focused services meeting Framework requirements defined in Schedule 1 and 1A.

## Digital Marketing Process

This process is run linearly or flexibly for Agile.



## Explore

### Objectives

We map Digital Marketing objectives to the National Performance Framework.

For Scottish Enterprise we campaigned to *'Raise understanding among fast-growth businesses of how to deliver innovation' to support the National Outcome 'Scotland renowned for research and innovation'.*

SMART objective setting is the start-point:

**Specific:** Single-minded objectives easier to deliver and to relate to barriers/drivers.

NHS Health Scotland HIV testing campaign - audience barrier was finding discreet local services - the objective became driving digital service finder searches.

**Measurable:** Measurement needed to calculate ROI/continuous improvement.

For Safer Scotland Human Rights campaign, measurable objectives for attitude segments covered Reach; Engagement (click-through-rates, likes, etc.); and Support (social media advocates).

**Agreed-upon:** Collaboration ensures stakeholders support objectives, avoiding unintended consequences.

For NHS Health Scotland HIV testing campaign, some stakeholders were concerned testing messages might detract from safe sex messages.

**Realistic:** Objectives must be achievable within context/resources, without being unambitious.

SCVO's objective was to raise poverty awareness without any media budget. Our award-winning approach leveraged cut-through sharable social media content.

**Timely:** Well-timed intervention can be as effective as years of campaigning, objectives should be short and longer term.

Our annual objective for Edinburgh Fringe is to increase ticket sales before the festival ends. For Greener Scotland the objective is carbon reduction by 2020.

### **Audience Insights**

It is virtually impossible to effect behaviour change without understanding drivers and barriers behind current behaviours - influenced by e.g.: social-demographics, motivations, attitudes, self-efficacy and available support.

For our Human Rights campaign, people were influenced by negative scenarios so believed human rights was irrelevant to them.

We start with desk research using:

- **Wrap-up reports:** from Framework projects/our other client work
- **Free resources:** e.g. ONS, OFCOM
- **Digital intelligence:** current activity analytics, search terms
- **Partner intelligence:** no-cost partnerships sharing knowledge

And a range of models to provide a framework:

- Theory of Planned Behaviour
- Prochaska Stages of Change Process
- Customer Value Proposition Canvas
- Experiential Planning / Consumer Journeys
- EAST framework

When developing the Scottish Development International (SDI) content strategy, we used 49 source documents, gaining C-Suite audience insights. Prochaska's model established that additional content was required at pre-contemplation stage before any behaviour change would result.

**Leveraging first-hand experience:** Where relevant, we will put ourselves in audiences' shoes.

For Scottish Enterprise, we went through their business support process, as a customer would, informing digital content pieces in line with EAST principles.

**Commissioning research:** We recommend approaches accommodating budget/timings - either qualitative/quantitative or explorative, amongst stakeholders, employees, clients or consumers. We collaborate with Research Framework agencies or subcontract to [REDACTED] for innovative approaches: ethnography and mobile surveys; Facebook forums; 'mindset targeting' for programmatic advertising.

We commissioned research for Business Stream to understand how businesses used, monitored and purchased their water. This shaped business personas informing user-centred digital solutions.

**Data, segmentation and targeting:** Data analysis helps us uncover commonalities to create like-minded segments for efficient and effective targeting.

For our Human Rights awareness campaign, the Equality and Diversity Forum's segmentation identified four distinct attitudinal groups - we focused on two most open to change.

## Strategy

Our collaborative strategy development process turns insight into action, leveraging what we know about our audience into digital activations that resonate and motivate. An effective strategy defines an engaging proposition and the most effective channels.



We developed personas for Food Standards Scotland identifying diverse messaging needs e.g. 'concerned allergy sufferers' and 'uninformed students'. These will inform an inclusive website with the right user journeys.

## **Evolve**

Now the strategy is brought to life - cutting-through, inspiring and motivating. Digital marketing unites creative, content and technology to meet public body objectives and audience needs.

This phase will:

- deliver a complete digital marketing strategy and roadmap (including engagement strategy) started in the Explore phase
- evolve and deliver activity

## Creative Delivery

### **Tone / Style and Format**

Creative and content will:

- **Interrupt** with relevant messages. Tools such as LAB profiling support message/tone of voice development.
- **Enable** by moving audiences through stages of behaviour change, empowering with content they seek out and share. Useful content is what brings users back and attracts new users through organic search (owned), advertising (paid) and shared content (earned).

### **User experience and testing**

Our in-house UX team ensure campaigns and projects support successful user journeys applying testing when necessary (Question 2.2.5). Each campaign interaction moves audiences closer to the project goal.

[REDACTED]

### **Technical: Facilitating and delivering**

We take a digital first approach, developing creative for multiple devices/formats. Our technical teams deliver web, mobile and desktop apps (Question 2.2.4).

### **Channels**

We collaborate with media agencies to define **paid, earned and owned** activity mix.

### **Content marketing and development**

We develop content marketing campaigns using a mix of content types and channels.

Our digital content for Tennent's Lager increased brand-tracking scores for "Heard good things about recently" by [REDACTED]. Our content for VisitScotland resulted in [REDACTED] more time spent on site.

### **Conversion optimisation**

Pre/during campaign we review the full conversion journey, optimising paid channels via A/B testing of placements, channels and creative, both by media agency reporting and end-to-end goal tracking. (A low CTR ad with a high onsite conversion rate can outperform a high CTR ad on a goal basis).

[REDACTED]

### **Social media and communities**

Bloggers, experts, peers, stakeholders etc, are key influencers, essential to achieving attitude change in the short-term.

Our creative, content generation, community management, posting, monitoring and evaluation for Business Gateway has delivered significant growth in businesses contacting local offices. Our strategy, platform selection/setup/build, community management and content review has launched and grown VisitScotland's iKnow Community.

## SEO

We deliver ethical and best practice SEO strategy, keyword mapping and tracking, understanding interplay between paid and organic. Subcontractor [REDACTED] supports large scale projects and independent SEO reviews.

For Scotland.org, our SEO content creation, optimisation and technical implementation has targeted long-tail keywords creating significant domain authority and inbound natural search traffic.

## Partnerships

Partnerships support awareness raising (or challenging perceptions) driving initial engagement with hard-to-reach audiences. Our subcontractor, [REDACTED]

[REDACTED]

[REDACTED]

## Paid

Strategy, creative and production of paid and digital advertising including Scotland's first digital interactive ad for Road Safety Scotland and recent display advertising campaign for Food Standards Scotland.

## Evaluate

Evaluation is at the heart of our process evidenced by our 2016 RAR win for Effectiveness.

### Measurement

#### Metrics

Metrics must reflect SMART objectives, audiences and channels, collated across channels, other agencies, third parties and sometimes tracking research.

We build evaluation frameworks from metrics across four categories:

- 1. Digital**

Hard and soft KPIs that can be exactly measured e.g. ad impressions, site bounce rate, Twitter # use.

- 2. Quantitative**

Stated awareness/knowledge/behaviour change e.g. collected via onsite survey, tracking study.

### 3. Behavioural

Actual behaviour e.g. numbers of cigarettes sold.

### 4. Outcomes and impact

Real results e.g. lung cancer deaths.

## Methods

We define how frequently each metric will be captured, pre/during/ post project, to:

- benchmark
- optimise 'mid-flight'
- evaluate

Social marketing campaigns usually leverage several channels, building cumulatively with potential for social norming. This provides challenges for single-channel evaluation e.g isolating digital. Content and digital activations can be included within pre/post campaign tracking as radio/print is evaluated alongside TV.

Our subcontractor, [REDACTED] applies evaluation tools including AdEval which measures how motivational a campaign has been, a good indication for behaviour change.

## Lead generation, nurturing and scoring

**eCRM:** supports very targeted messaging and one-to-one engagements nurturing long-term behaviour change.

The Scottish Government Greener strategy was to create a personalised 'digital daisy chain' across all channels (including eCRM, social, content, website) to empower and enable change. Behavioural insights around motivation were applied eg rewarding small steps, evidencing collective change and building positive social norms. ATL, partnerships and field activity integrated with this approach, providing tactical seasonal campaigns driving awareness and traffic.

**Marketing automation:** Using several marketing automation tools (e.g. [REDACTED]) our specialists run sophisticated prospect development campaigns for clients including [REDACTED] leveraging ongoing customer insight.

## ROSMI/ROI

Calculating ROSMI is challenging because:

- successful influence may require multiple activations/years
- outcomes and impact may take a long time period to report

For Road Safety campaigns, change is quantified with road accidents/fatalities by Police Scotland and Road Safety Scotland. For Organ Donation, the number of sign-ups can be reported almost instantly, the number of lives saved through availability of donors is harder to track.



Every project's evaluation framework will include outcomes, impact and ROSMI/ROI.

SCVO's poverty awareness campaign targeted an increase in Scottish adults viewing situation as 'very unacceptable' from [REDACTED] Digital metrics tracked: [REDACTED]

For Highland Spring, we evidenced content marketing effectiveness, by comparing brand-tracking both when content marketing was and wasn't running. Results within target segment: [REDACTED]

### Learnings

Key insights from metrics and evaluations will:

1. **Feedback into strategy**, updating personas, user journeys and propositions guiding future creative/channels.
2. **Feedback into campaigns**, enabling project optimisation 'mid-flight'.
3. **Improve capability** across agencies and Public Bodies when shared at our EventSpace workshops.

VisitScotland recorded very high staff satisfaction with our recent session developed from project insights on user-generated-content.

**Question 2.2.4 (Word Count 1800: Whitespace response: 1755 words)**

*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.*

We recognise the breadth of website design and build services and the importance of compliance with the High Level Operating Framework and Digital First Service Standards.

We support Public Bodies when deciding the best technologies to meet requirements by:

- auditing existing assets avoiding duplication (e.g. landing page framework reuse on Greener Scotland)
- checking open source/commercial products which could meet requirements (e.g. )
- reviewing end-user technical limitations – delivering web apps, as well as native mobile/desktop apps for specific uses.

**Project methodology**

We collaborate with clients, selecting the best methodology:

Methodology	Application
Waterfall	[Redacted]
Agile	[Redacted]
Hybrid	[Redacted]

**Key stages**

Web apps vary from single page websites to the engines that power the world’s biggest and fastest growing organisations. The same is true for mobile and desktop apps.

Project structure will differ to suit projects, however many of the key stages will apply to most. These project stages complement and support the top-line strategy stages defined in Question 2.2.3.

Strategy stage: Project stage	Deliverables	Our actions
<b>Objectives:</b> What are we trying to achieve?	KPIs - digital marketing and performance	[Redacted]
<b>Audiences and insight:</b> What do audiences need?	Digital Audit	[Redacted]
	Target audience personas/User stories	[Redacted]
<b>Strategy:</b> What is the best application approach?	Choice of application	[Redacted]
<b>Implementation:</b> What do we deliver?	Architecture and wireframes	[Redacted]
	Design	[Redacted]

	Technical spec	[REDACTED]
	Build	[REDACTED]
	Test	[REDACTED]
	Launch	[REDACTED]
<b>Measurement and learnings:</b> What was achieved? How can we improve?	Reporting and recommendations	[REDACTED]

**Digital transformation**

Whitespace specialist: [REDACTED] (see CV Question 2.3.2).

Subcontractor: [REDACTED] user needs analysis, service design

We deliver:

- digital transformation (activities, processes, competencies, models) to maximise digital opportunities with new web, mobile or desktop apps
- digital transformation of existing web, mobile or desktop app services

Our outputs include:

- Process mapping and user needs analysis
- Concepts and design
- Technical scope, development and testing
- Training and launch
- Ongoing development

We completed user needs analysis, UI innovations, design, testing, and a marketing campaign for [REDACTED] new [REDACTED] platform.

For [REDACTED] we developed their IT&T Operating Model and communications to accelerate digital culture change.

[REDACTED] worked with [REDACTED] to create the UK's first emergency, cardless cash service winning a Cannes Gold Lion.

### **Key principles across web, mobile and desktop apps**

#### **Multi-platform and multi-device**

Web-based or native, our apps are built for multiple-platforms (Android, iOS/OS X, Windows, Linux) and multiple devices (mobile, desktop, tablet, smart TV, etc.). [REDACTED]

#### **Accessibility and assistive technologies**

We ensure maximum compatibility with accessible and assistive technologies across platforms. Our educational resource for schools, Road Safety Scotland's Your Call, was tested with children using screen readers and [REDACTED] for limited range of motion.

#### **Coding standards**

We ensure code is easy to augment, maintain and debug. Our Coding Standards Wiki follows industry standards adding toolset guidance and project-specific client requirements.

This has been particularly valuable working with ACCA development teams and freelancers on Agile Sprints.

#### **Open standards**

We track all web open standards projects as they progress through Draft stage, using W3C Open Standards daily: HTML, CSS, XHTML, WCAG, DOM, SVG and ARIA, with awareness of future Web Storage, Web Notifications and Web Workers projects.

#### **Open source**

We are strong advocates of open source, contributing code to several projects. Our standard web technology stack is [REDACTED]

Working with Seafish demonstrates how open source stack is not only cheaper via reduced licencing costs, but also resource efficient, further reducing cost of ownership.

### **Collaborative working**

With the speed of change in digital it is essential to collaborate internally and with other agencies.

An example was a collaboration with MediaCom on the Subway account where we launched the UK's first time targeted and live-time tracking display ad campaign.

### **Training and documentation**

We document our solutions so developers can easily understand the system to host, maintain, extend and re-use components. Manuals/documentation/training provided to ensure users and developers can maximise use of system.

For Hymans Robertson we developed written training/documentation and video tutorials/screen casts to enable all CMS users to maintain the website.

### **Analytics and evaluation**

We identify the appropriate evaluation framework to evidence and monitor effectiveness, value for money, outcomes and impact. Metrics may combine hard results (e.g. email subscribers, web analytics) qualitative/quantitative research techniques (e.g. awareness or perception), as well as the latest digital tools (e.g. social buzz tracking and marketing automation scores). (See Question 2.2.3.)

### **Quality Process**

Our process covering Quality Management Checks + QA is covered in Question 2.2.8.

### **Web app development**

Whitespace specialist: [REDACTED] (see CV Question 2.3.2).

Our standard web development toolkit is: [REDACTED]  
[REDACTED]  
[REDACTED]

### **Coding standards and stylesheets**

Whilst we preferred the more formal grammar of XHTML, our projects are now based on HTML5 - allowing us to utilise newer browser technologies (e.g. video, canvas) and allowing for more semantic mark-up. For IE8 we use [REDACTED]

Applications built around:

1. **Separation of presentation and content:** content will not dictate how it is presented to the end user. Semantic HTML mark-up will convey the correct meaning of content. CSS used for visual look and feel.
2. **Progressive enhancement** for any Javascript/CSS functionality - users with less capable browsers can still utilise the application.
3. **Mobile first** to ensure the application works effectively and delivers a rich experience across multiple-devices.

### **Accessibility**

All of our sites meet W3C WCAG 2.0 Level AA (or higher) via:

- logical page structure/hierarchy with semantic mark-up
- descriptive text for non-text elements
- subtitles for video/audio
- checking colour contrasts
- not using only colour to distinguishing elements
- resizable text
- consistent navigation/menu structure
- allowing keyboard navigation of the web page

Verified via testing:

- online tools
- built-in OS “voice over” functionality
- widely-used screen readers: JAWS/Window-Eyes with IE, NVDA with Firefox
- screen magnification
- assistive technologies for limited mobility
- real life users

Our websites for SG and [REDACTED] have successfully passed third-party accessibility testing.

### **Browser Testing & Quality Assurance (System Performance)**

Our browser compatibility matrix includes:

- Internet Explorer
- Chrome
- Safari
- Firefox
- Opera





## **Mobile app development**

Whitespace specialist: [REDACTED] (see CV Question 2.3.2).

Subcontractor: [REDACTED] - additional resource and expertise

Mobile apps designed and developed in-house and with our subcontractor [REDACTED] for all major platforms (iOS, Android, Windows) using a multi-platform framework (e.g. Unity or Xamarin) or native language:

- iOS: Swift/Objective C
- Android: Java
- Universal Windows Platform: C#

Single CMSs used for data aggregator/processor/distributor between platforms for consistency. Specific UI and UX design and testing plans delivered for each platform, especially important for Android with plethora of OS versions/devices.

Our game app for Road Safety Scotland reached over [REDACTED] the target number of children in Scotland and was selected by Apple as a 'Best New Apps & Games' for kids.

[REDACTED] multi-platform app for Road Safety GB Good Egg car seatbelt campaign ensures more children's car seats are fitted correctly.

## **Desktop app development**

Whitespace specialist: [REDACTED] (see CV Question 2.3.2).

Native desktop apps developed to address:

- lack of/inconsistent internet connectivity
- data entry requirements not suited to web app
- web app not possible due to platform constraints
- functional requirements impossible with web app (e.g. high spec interactive visualisations)
- integration with physical hardware

We develop native desktop apps for major platforms (Windows, OSX) using multi-platform framework (e.g. Unity or Apache Cordova) or native language using Microsoft Visual Studio or Apple's XCode.

We recently delivered a desktop version of award-winning Klang game for Road Safety Scotland for use in schools as well as Business Gateway's event, contact and lead management desktop app for Microsoft Dynamics CRM.

**Question 2.2.5 (Word Count 500: Whitespace response: 499 words)**

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

- details of how you will provide User Experience (UX) testing, providing information on user interaction with the application interface
  - details of how you will provide System Performance testing, to ensure the application is fit for purpose and meets the original requirements specification
  - 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.
- 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.

Within our Quality process (Question 2.2.8), [REDACTED] (CVs Question 2.3.2)

lead UX, Performance, Availability and Security Testing during:

- key development stages
- site updates
- and ongoing (e.g. quarterly).

This ensures user-centered, robust, secure, continuously improving product delivery within the Digital First Service Standard and High-Level Operating Framework.

**UX**

We recommend testing with real end-users with distinct needs - both against goals and product requirements (i.e. accessibility).

Project stage	Technique: criteria under test	Outcome
Scoping/defining	<b>Focus groups:</b> user requirements	Discovering/validating user goals/creating customer journeys.
Information architecture	<b>Tree-testing/card sorting/top task:</b> structure/labelling <b>Prototyping:</b> navigation interface	Refined site structure, navigation and nomenclature.
Wireframe/basic visuals	<b>Prototyping:</b> user-journeys, effectiveness, satisfaction <b>Eye-tracking:</b> effective visual impact	Refined wireframes/design brief.

Full design Beta/new site, pre/post live (or existing product at end of lifecycle)	<b>High-fidelity prototyping/developed site via face-to-face or remote research: end-to-end user-experience</b>  <b>Analytics: review</b>  <b>Audit: accessibility against WCAG.20 guidelines</b>	Ongoing improvement informed by: User scoring - applying usability scale.  Real-world data - journeys and conversions.  Accessibility compliance (AA & AAA).
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We applied these techniques for ACCA in markets including UK, Kenya and Malaysia, resulting in a ██████ increase in user satisfaction.

We subcontract for independent large-scale testing including specialisms e.g. eye-tracking.

### System performance

We ensure delivery of robust products matching specifications via System Performance tests:

Test	Description	Scenarios	Benefits
Automated front-end testing	Using <i>Selenium</i> testing framework (scripts, recorded sessions).	Complex interface interactions requiring minimal verification of backend output.	Repeatable, cost-effective evidence that front-end functionality meets specification.
Unit testing	Code developed for a test harness so each unit can be tested.	Web applications with complex business logic.	Repeatable evidence that business logic functions to specification.
User-driven browser/device testing	Manual testing via desktop virtualisation, physical browsers, cloud-based testing services.	Testing visual elements and interface interactions.	Cost effective for testing simple interactivity and cross device visual performance against specification.
Operational Acceptance	Testing system interactions with real world (e.g. email confirmations).	End-to-end testing with user sample or human-readable test script.	Assurance application delivers/integrates with business needs.

### **Availability/integrity**

To load, stress and soak test solutions we use:



Results inform code alterations, database query optimisation, server resources and solution configurations.

We soak tested an arts-sector client's solution revealing issues under large ticketing demand. The root cause was a database query which was refactored.

### **Security/confidentiality**

Training and processes cover:


- data transfer
- password transfer and generation
- workstation security

We meet HM Government's 10 Steps to Cyber Security and have begun Cyber Essentials Plus certification.

Our security QA covers:

- cross site scripting
- SQL injection exploits
- SSL setup and mixed-content warnings.

We apply OSWASP security guidelines on all development.

We subcontract independent penetration/advanced security testing which we've completed on multiple solutions e.g. Scottish Government International Marketing 

### **Hosting and data**

Through deployment, relationship management, security auditing and testing we ensure hosting solution/technology stack delivers confidentiality, integrity and availability of the application and data. Hosting partners checked for ISO 9001, ISO 14001 and ISO 27001.

**Question 2.2.6 (Word Count 500: Whitespace response: 500 words)**

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

- a) Support & Maintenance: providing details on how your organisation will provide support services in relation to the core development, including performance analytics and management reporting;*
  - b) Data Migration: providing details on your organisations ability to extract data from other systems including any common data formats used;*
  - c) 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).*
  - d) 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;*
- Tenderers must also provide details of any services which will be carried out by Sub-Contractors in delivering these service requirements."*

**Support & Maintenance**

**Core development support**

Support available: email, 24x7x365 telephone, online HelpDesk.

Ticketing system assigns and tracks requests and maintenance support. Proactive maintenance applies system improvements eg. new version of JavaScript library. Reactive maintenance resolves issues discovered via testing or performance analytics/monitoring.

All activity documented in Change Requests. Deployment Plan is developed in line with agreed Governance Process following review by all parties.

**Performance and reporting**

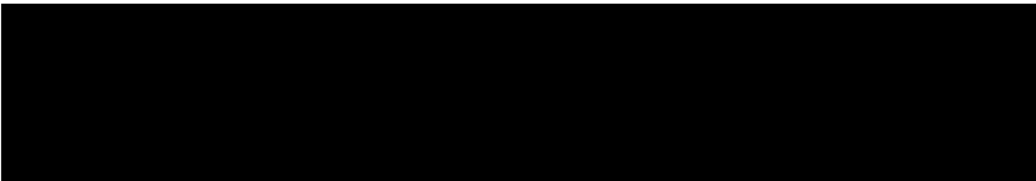
Ticketing system provides management reporting including: open issues, resolution time, SLA priority-based classification.

## **Data Migration**

### **Ability**

We aim to use automated processes and open data/file formats to migrate data. Migrations start with scoping with Clients' technical team(s) to agree approach.

We have considerable experience of developing code/techniques to extract useful data from systems:



### **Formats**

Common data formats include SQL, CSV, XML JSON. Data is usually imported into Relational Database - usually MySQL.

## **Security Services**

We securely develop and test solutions so the full technology stack is securely configured/managed.

### **Data storage**

For secure data storage we encrypt:

- sensitive data at rest
- file systems
- data backed up to off-site data centres
- data on removable media.

### **Data transfer**

Clients (e.g. [redacted]) regularly audit our secure customer data transfer including: SSL connections enforced for all browser based and internet data transfer (eg. https, sftp, ssh); firewalling limits access to transfer methods.

### **Secure website certificates**

We use certificate registries, offering client support through steps for Extended Validation. Certificates are provisioned by Whitespace or hosting partner before being verified by Whitespace via online tools checking:

- certificate chain is complete
- cipher suites are appropriate
- "DROWN", "BEAST", "POODLE" attacks = negated.

## **Hosting**

We partner with Clients' providers, with good relationships with many including iomart. Where no partner exists, we offer hosting with subcontractors [REDACTED] and [REDACTED]. Hosting in line with Data Hosting and Data Centre Strategy for the Scottish Public Sector:

- cloud based
- virtualised
- cost-effective
- carbon neutral
- efficient
- highly available.

Our hosting for Lothian Buses cost-effectively scales to meet high-peak traffic volumes for Edinburgh's key events (eg. Hogmanay/Festivals).

## **Security**

We take responsibility for security:

- best-in-class virus/hostile threat scanning
- monitoring
- third party ethical hacking tests
- alerts directed to on-call technical support team 24x7x365
- information security processes follow ISO 27001, planning for certification by end 2017

## **Networking facilities and resilience**

Solutions built on:

- secure/resilient networks
- multiple internet connections
- firewalls
- load balancers
- private cloud file data stores
- back-up
- virtual machines allowing for snapshots and replication to second data centre

## **Documentation standards, ISO 27017, Government security classifications**

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

**Question 2.2.7 (Word Count 800: Whitespace response: 800 words)**

*Please detail your organisation's plans for implementing a process of continuous improvement that will ensure 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 development 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.*

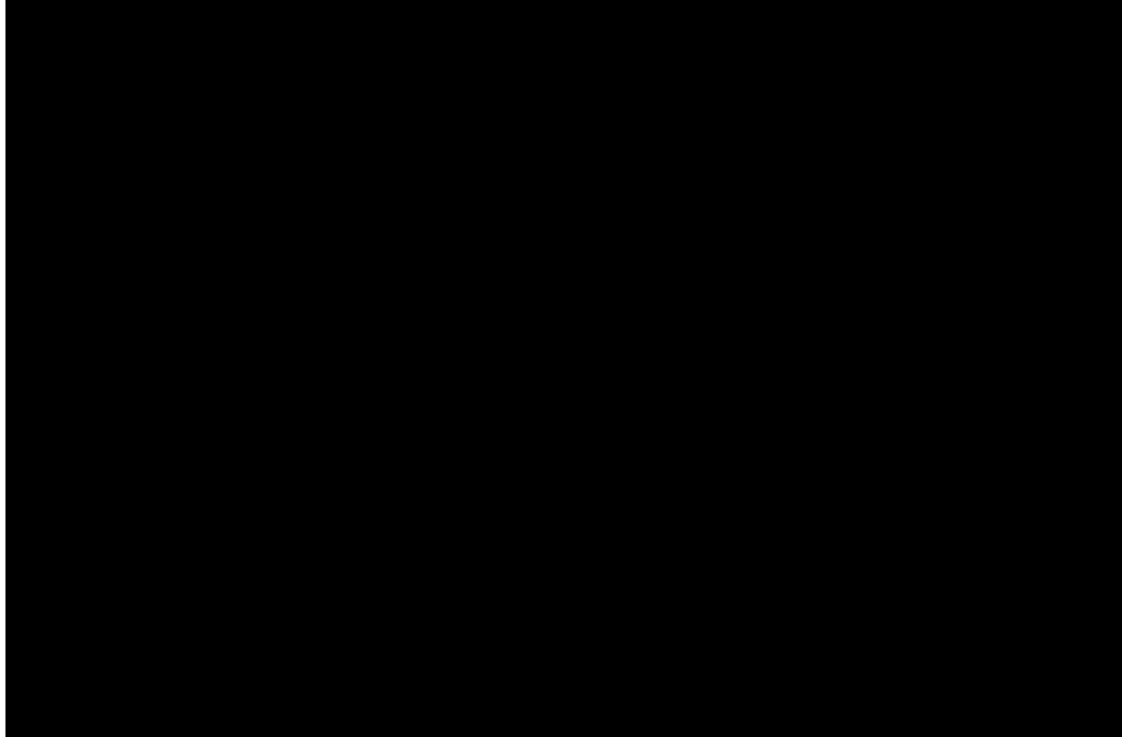
██████████ Managing Partner, leads our Continuous Improvement Programme which will continue to implement initiatives at three stages during the Framework.

Improvement is everyone's responsibility, but accountability is assigned to individuals.

Stage	Scope	Accountability



This cyclical approach continually increases skill-set, maximising competence at each stage:



Its success is evidenced by our clients whose independent survey feedback secured us a win for Effectiveness - Recommended Agency Register (RAR) Digital Awards 2016: *"Whitespace regularly makes recommendations above and beyond initial brief requirements. This makes each spend stronger and more impactful"* (Anonymous).

### 1. Overall capability

Our ongoing induction, training and collaboration programme contributed to our Best Companies 2-star (outstanding) accreditation for Best Employer practices – one of only 23 companies in Scotland (738 in the UK) to achieve accreditation in 2016.

Initiative	Description
[Redacted content]	

## **2. Project optimisation**

We embrace the Digital First Service Standard which requires continuous improvement during project planning/delivery. The table illustrates how we applied this for professional accountancy body, ACCA, which supports 178,000 members and 455,000 students in 180 countries.

Digital First Service Standard	Example application

### 3. Project review and client satisfaction

We implement several initiatives to monitor and improve project delivery, service and satisfaction.

	Internal	External

Combined, these initiatives capture metrics mapped to the Scottish Government recommended Balanced Scorecard. This is supplemented by specific measures required by individual projects/clients. The output is a completed reporting dashboard (below) applied at:

- project
- account
- or Framework level. [REDACTED] (CV Qu2.3.2) will send a Quarterly Balanced Scorecard report to the Framework Authority.)

It merges quantitative and qualitative measures and requires recommended improvements against each category.



**Question 2.2.8 (Word Count 600: Whitespace response: 600 words)**

*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.*

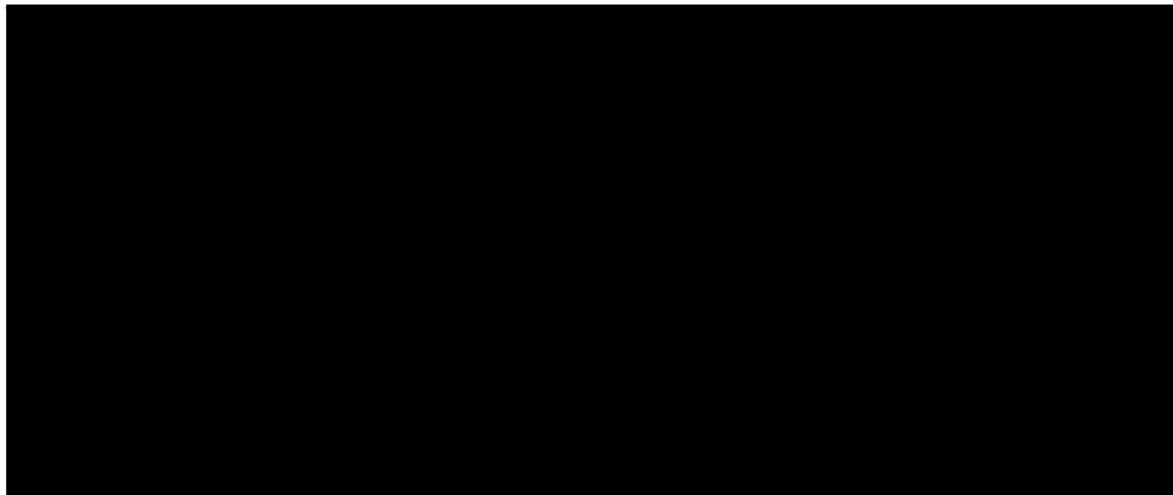
As a Digital Marketing contractor for the Framework Authority since 2009 (formerly with the Scottish Executive from 2003), we will apply our experience of successfully managing capacity, service levels and quality - for fluctuating workloads - for multiple Framework Public Bodies simultaneously.

Service Area	Managing Partner Accountability
Capacity	
SLAs	
Quality – Account Management	
Quality – Strategic and Creative	
Quality – Technical	

**Capacity**

**Permanent resource**

During peak workloads, resource is drawn from our substantial team of [REDACTED] with effective processes ensuring new project staff are up to speed quickly.



### **Subcontractors**

Our network of subcontractors and freelancers maximises capacity at peak times and provides specialist expertise.

All contractors are vetted, given the same induction as permanent staff, and comply with SLAs, confidentiality and quality procedures.

### **Business planning process**

Projects are categorised and input into [REDACTED] our live resource-management tool, up to a year ahead.

- **Projected time:** on confirmation of a new contract (e.g. Framework Transition), or after annual planning for long-term clients, we input resource projections e.g. SG International Marketing Team needs annual support for three Winter Festivals
- **Planned time:** once estimates/timings are with clients for approval, resource is automatically ring-fenced
- **Confirmed time:** once estimates/timings are approved, resource is formally booked
- **Contingency time:** based on experience, we add sensible contingency time.

In weekly meetings (Board Members and Account Directors), resource reports from [REDACTED] immediately identify potential bottlenecks, short/long-term. Capacity is adjusted through team restructures, subcontracting or recruitment.

### **Geographic capacity**

We can effectively service Public Bodies across Scotland from our Edinburgh City Centre HQ:

- located 300m from airport tram
- Haymarket/Waverley stations – walking distance
- City Car Club membership
- all staff can work from client offices with their laptops and network access
- client teams often based in our office.

**Service level**

Whitespace is committed to delivering consistent service levels to all Public Bodies:

- the Framework Service Level Agreement (SLA) will apply to all regardless of client spend or geography
- some Public Bodies may have account/project specific SLAs
- our aim is to go beyond minimum SLA standards.

We expect the Framework SLA to map to the categories in the Scottish Government recommended Balanced Scorecard. (Source p54, Framework Agreement.)

Word-count does not permit full template completion, but we propose this example SLA for Service category – Communication\*:

<b>SERVICE - Communication</b>	<b>Response commitment</b>
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

\*Note, SLA will be superseded by the CODE RED commitment for emergency requirements (see Question 2.2.9).

**Service quality**

We start with a client induction, so we mutually understand ways of working and adapt any if necessary.

Our Quality Management Process – the first linear, and the second AGILE (included at end of question) is based on:

- clear briefs including objectives approved by all parties, providing benchmarks against which work can be evaluated
- regular internal reviews and maintaining project Risk-Logs
- Team Leaders checking all work at major stages - spot-checks completed by Managing Partners.

## **Monitoring**

SLA and quality are monitored through our Continuous Improvement Programme, outlined in Question 2.2.7.

The following quotes from three clients in the 2016 independent RAR survey evidence our success delivering service levels and quality:

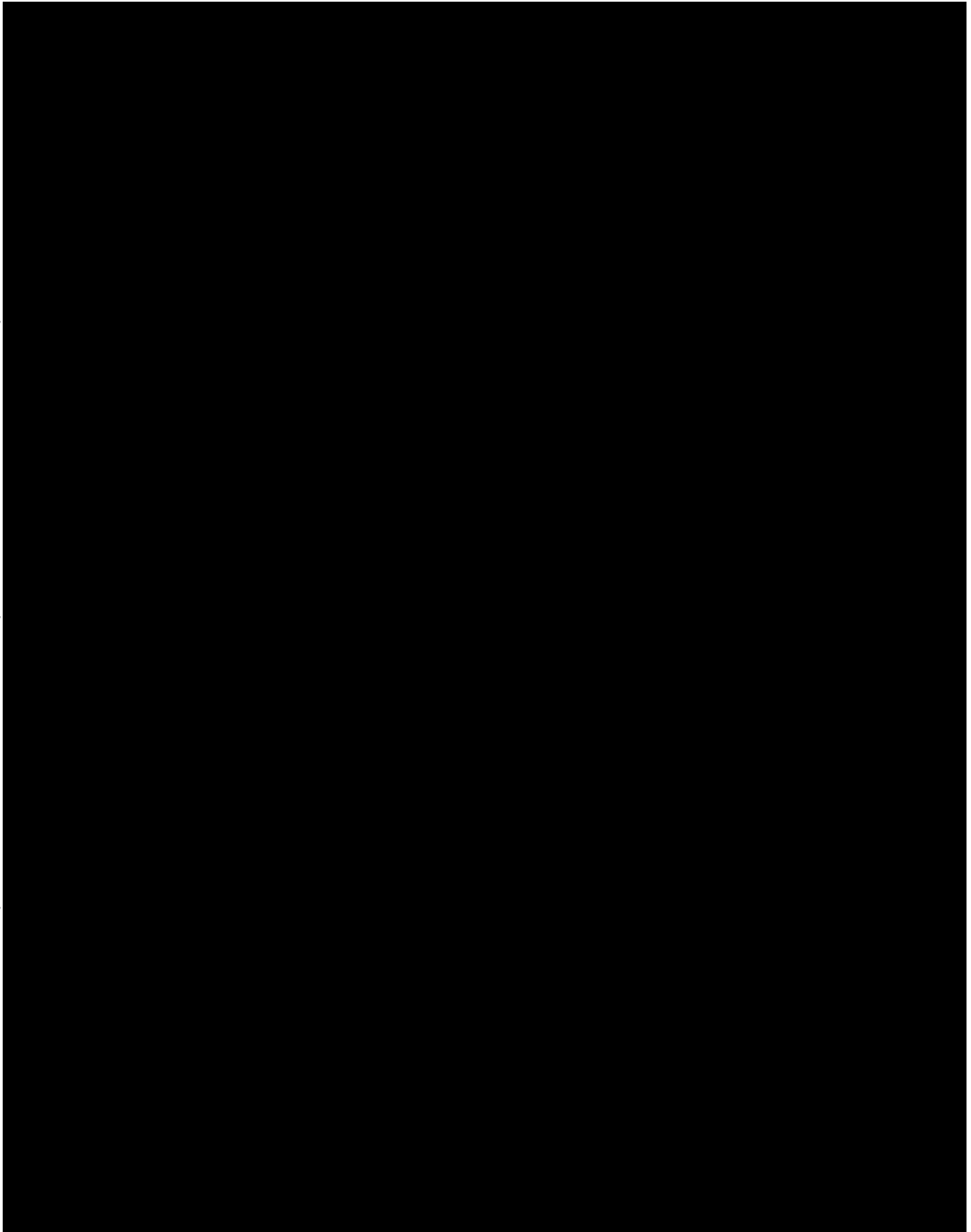
***"Great work to tight schedules....."***

***".....take the time to walk you through their well-considered rationale for any piece of work - big or small."***

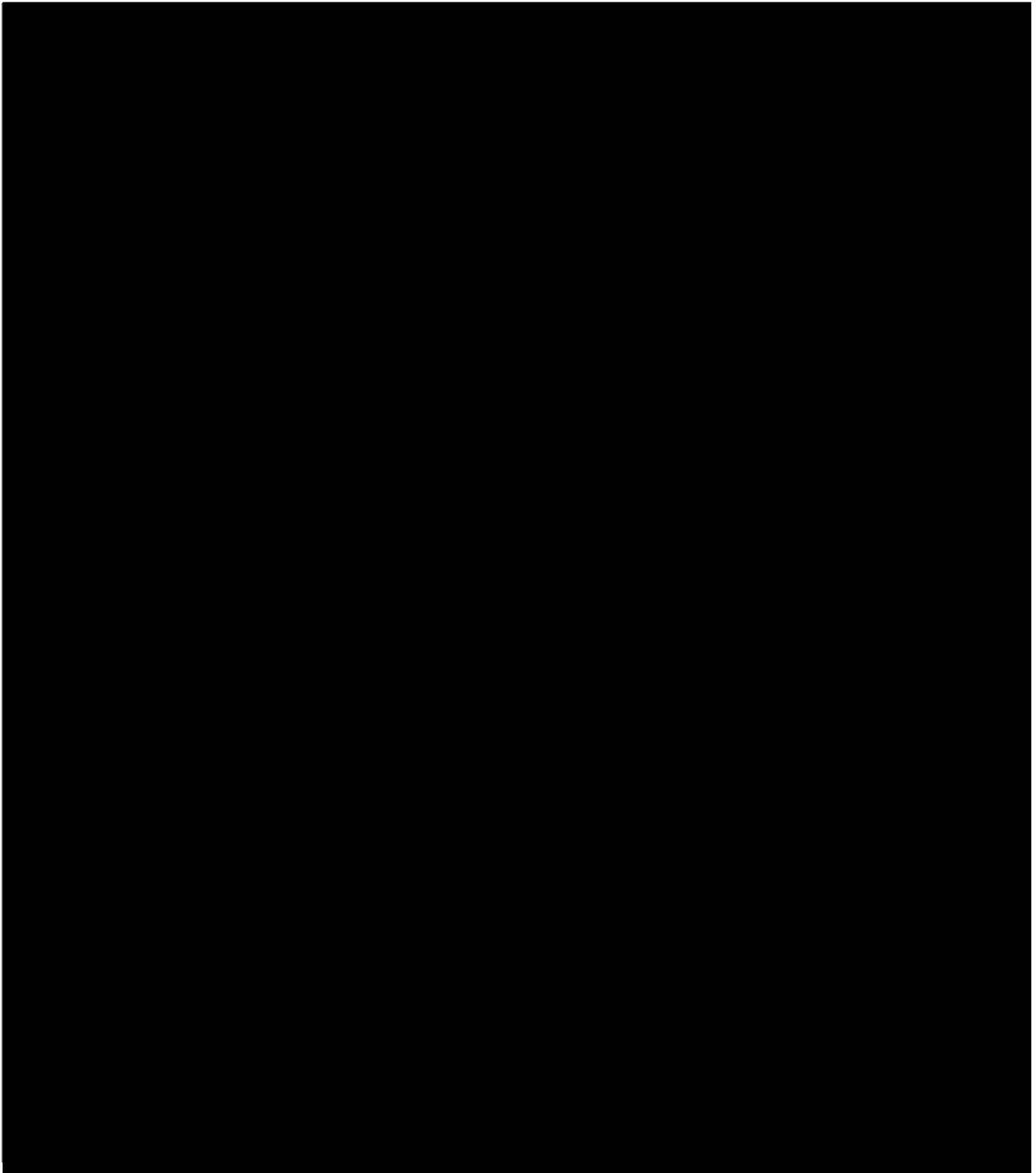
***".....well prepared, on time, make you feel like they are thinking about you all of the time."***



## Quality Management Process – Standard



## Quality Management Process – Agile



**Question 2.2.9 (Word Count 800: Whitespace response: 786 words)**

*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.*

**Defining urgent and emergency requirements**

- general emergency events: including adverse weather conditions, disease outbreaks and terrorism
- specific emergency events: Public Bodies' organisational or Digital Marketing project continuity, including cyber-attack or high staff sickness
- urgent information requirements: to prevent or respond to extreme events or Freedom of Information requests.

**Emergency prevention and preparation**

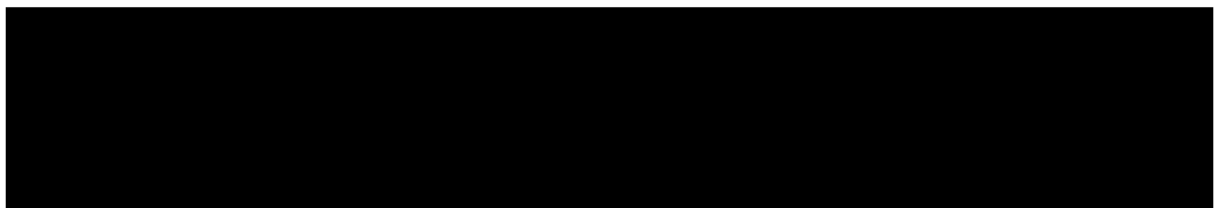
**Understanding and experience:** we understand the role of Public Body communications in encouraging prevention and preparation behaviours.

Examples include:

Client	Project	Whitespace role
Food Standards Scotland	'Food Poisoning' summer campaign and 'Wash Your Hands Not Your Poultry' – prevention/avoidance	Website design and production.
Scottish Government Safer Scotland	Don't Risk it campaigns - preparation for getting home safely	Design and development of website and interactives.

**Prevention - Business Continuity (BC) and Quality Assurance (QA):** our BC Plan and QA processes (see Questions 2.3.4 and 2.2.8) ensure that we minimise the risk that our service delivery availability or quality becomes a specific emergency event for a Public Body.

**Preparation - training:** induction and six-monthly refreshers for Whitespace staff and subcontractors working on Framework projects covering:



CODE RED Team Leaders and Deputy Team Leaders receive additional training, including scenario planning, every six months.

**Urgent and emergency events**

**CODE RED team structure**

Our CODE RED contact and leadership structure mirrors our Business Continuity Event structure and process which:

- has been implemented effectively during previous power outages.
- ensures all staff contact details are formally checked monthly.
- ensures all client contact details are formally checked quarterly.
- is tested every six months.

When an alert is received, all team members will be contactable 24/7 and relieved of all other duties.

Role	Who	Responsibility
Overarching responsibility	[Redacted]	Preparing, testing and updating Whitespace CODE RED and BC Processes.
Team Leader	[Redacted] [Redacted] [Redacted] [Redacted]	Overall responsibility of alert response; Schedule, chair and minute regular status meetings with all relevant internal and external stakeholders; Maintain and monitor risk log, including agreed formal notification procedures for risk escalation; Present debrief report.
Deputy Team Leader	[Redacted] [Redacted] [Redacted] [Redacted] [Redacted]	Resource management ensuring correct level of cover and continual support.
Core team	[Redacted] [Redacted] [Redacted]	Implementation.
Support team	[Redacted] [Redacted]	Implementation.

### **Contacts**

- **Switchboard number:** 0131 625 5500
- **24/7/365 number:** [REDACTED]
- **24/7/365 contact details:** provided on appointment for Team Leaders, Deputy Team Leaders and senior staff from sub-contractors.

### **CODE RED procedure**

#### *Mobilisation*

- Public Body advises CODE RED through 24/7 contacts, flagging any confidentiality implications.
- on-call Team Leader and Deputy Team Leader identified and available for client call immediately.
- Team Leader identifies all staff and subcontractors allocated/with experience on the client/project using our internal time-sheet database; then uses BC call tree to inform personnel and advise ceasing all other work immediately, becoming a dedicated resource until further notice.
- if required, the call tree will mobilise additional resource within 4 hours of the original alert. Our database will be used to identify those with relevant skills and experience.
- if a general emergency impacts several Public Bodies simultaneously, the call tree, and/or our agency-wide email to SMS will inform all staff via their main mobiles to cease all non-critical work, devoting full resource to the emergency.

#### *Briefing*

- team assembled for briefing via conference/video call or at Whitespace\*/client location, attended by Public Body.
- Public Body advises CODE RED requirements, timings and approvals. Whitespace confirms team member roles and 24/7 contacts.
- Team Leader assesses whether any additional resource, including sub-contractors is required and mobilises accordingly.
- a location is identified as a 'war room' to achieve optimum communication, collaboration and delivery.

#### *Planning and response*

- CODE RED plan including timings\*\* and budget\*\*\* agreed and forwarded to Public Body for approval, along with risk log and contact details for full team.
- plan actioned and status meeting/call schedule agreed eg. hourly or daily.

*Review and feedback*

- on completion, Team Leader conducts debrief, presenting written report to Public Body.
- Team Leader amends CODE RED procedure with learnings, forwarding to all Public Bodies to enable continuous improvement.

\* If Whitespace office is inoperable, alternative accommodation/equipment will be available as per our BC Plan.

\*\* Timings may supersede agreed Service Level Agreements.

\*\*\* Under CODE RED conditions, Whitespace acknowledges work may need to proceed in the absence of a purchase order.

**Question 2.3.2 (Word Count 1800 – Whitespace response: 1796 words)**

**+ (Word Count 250 per CV)**

*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 [Digital Marketing] 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).*

Our full agency will deliver Framework services, so we can manage multiple Public Bodies simultaneously, and have capacity to send teams on-site for wider geographical locations.

As a current Framework supplier, training covering Framework requirements is embedded in Whitespacer inductions, giving flexibility to adapt team structures during peak periods. Training will be updated with Schedule 1 and 1A requirements.

Account Management teams manage multi-channel projects across service areas. Based on 15 years' Public Sector experience (7+ on formal Frameworks), each Public Body is treated as a separate client and assigned an Account Management team with capacity and expertise. This way, clients access the best expertise via long-term relationships.

### **Service delivery structure**

Whitespace will deliver all Framework services. If extra capacity or specialist expertise is needed, subcontractors will be utilised.

All subcontractors:

- we have worked with previously
- have public sector/Framework experience
- commit to our processes to deliver excellent levels of quality and security
- are long-established/respected.

Key staff CVs from subcontractors are provided (Part 4).

<b>Service</b>	<b>Activity</b>	<b>Subcontractor</b>
Marketing strategy	Bespoke audience research	██████████
Partnerships	Sourcing, contracting, licensing	██████
Digital technical	Independent accessibility audit and user-testing	██████████
	Service design	██
Website design and build	Mobile apps	██████████
	Penetration testing	██
	Advanced security testing	██████
Hosting	Full service	██████████
SEO	Independent review	██████████

### **Organisational structure**

Full Agency organogram is provided (Part 3), with:

- Senior Team members highlighted where CVs are provided (Part 2). CVs detail specific responsibilities for service requirements from Schedule 1 and 1A.
- Support staff with reporting lines (Part 3).

### **Framework responsibilities**

A named individual will continue to have overall accountability for core Framework requirements (examples CVs provided - Part 4). Responsibility for generic requirements will be assigned across departments:



Team	Framework responsibilities (examples)
Board	<ul style="list-style-type: none"> <li>• business continuity, cyber-resilience</li> <li>• service levels and QA process</li> <li>• performance management, Framework MI, review meetings</li> <li>• best employer practices</li> <li>• monitoring staff and subcontractors to reduce risk</li> <li>• Continuous Improvement Process</li> <li>• Client satisfaction</li> </ul>
Account Management	<ul style="list-style-type: none"> <li>• estimates, invoicing, budget and resource control</li> <li>• project plans, status reports, risk logs, approvals</li> <li>• legal compliance - eg DPA, CAP code</li> <li>• management of subcontractors</li> <li>• expert advice on methodology and best value</li> </ul>
Planning & Strategy	<ul style="list-style-type: none"> <li>• strategic review - all activity complies with broader organisational objectives</li> <li>• monitor competitive activity</li> </ul>
Digital Marketing	<ul style="list-style-type: none"> <li>• monitor digital marketing developments, trends, best practice</li> <li>• monitoring KPIs</li> </ul>
Creative & Studio	<ul style="list-style-type: none"> <li>• brand guardianship</li> <li>• Public Body logo database</li> <li>• photography copyright permissions</li> <li>• photography submission to Scottish Government Digital Asset Management System (DAMS)</li> </ul>
User Experience	<ul style="list-style-type: none"> <li>• compliance with Digital First Service Standard</li> <li>• accessibility compliance</li> </ul>
Digital Production	<ul style="list-style-type: none"> <li>• compliance with High Level Operating Framework</li> </ul>
Office and Event Management	<ul style="list-style-type: none"> <li>• provision of added value workshops, bespoke client training</li> </ul>

### **Mechanism for approval of personnel changes**

Key individuals are critical to delivering services. We are proud of our staff retention rate. Our [REDACTED] senior staff (CVs provided - Part 4) have an average of 5.5 years' service with Whitespace.

We understand:

- reactive staffing changes (e.g. illness, maternity, resignation) must be communicated immediately
- agency-initiated changes must be approved by the Authority - [REDACTED], Managing Partner would provide rationale in writing/meeting.

In the unlikely event of delivery risks, this will be flagged immediately, risk assigned, recorded and monitored.

Proposed replacement personnel (including sub-contractors) will be:

- at least equivalent (level, experience, training, qualifications)
- subject to the Baseline Personnel Security Standard clearance
- provided with appropriate transfer period.

We will provide vetted CVs with references, demonstrating experience with similar marketing objectives and services. Public Bodies may participate in recruitment process. Any new Whitespacer will be introduced to Public Bodies and approval sought for their project participation.

### **Working out with normal hours**

Project timings and staff resource planning includes contingency accommodating sickness and changes to requirements. Processes ensure projects can be delivered, where possible, in normal working hours (09:00 – 17:30, Monday to Friday).

We understand work out with normal hours will be required for day-to-day delivery and emergencies. For example, developing the new brand for Transport for Edinburgh, we needed to photograph a tram during the only test run in the middle of the night.

We take our responsibilities as a Best Practice Employer seriously (see Question 2.5.2) and apply the following to provide out-of-hours resource without exploitation:

- **Flexible working policy:** █████ of staff working flexibly as they in fact, prefer to work evenings and weekends
- **Remote working:** remote network access and laptops enables home-working out of hours and from clients' offices
- **Office access:** 24/7/365 staff access with lone-working policy ensuring staff safety
- **Duty rota:** on-call rotas for 24/7 CODE RED contacts (Question 2.2.9) and services (e.g out of hours social media monitoring)
- **Working Time Regulations (1998) and Working Time (Amendment) Regulations (2003):** timesheets monitored to ensure compliance with legislation.

### **Business continuity – staffing**

Business Planning processes (see Question 2.2.8) consider:

- **Holidays:** project plans include planned holidays (Public Body and Whitespace staff), ensuring no work/sign-off required over agreed absence
- **Short-term absence:** project management tools ensure all project information held centrally; short term absence e.g. sickness can be covered by other team member. Weekly production

and regular project meetings ensures knowledge sharing

- **Long-term absence:** We can draw resource from across the Agency – all of whom have public sector experience – and increase resource via freelancers who have completed Whitespace induction including processes and quality management procedures
- **Staff turnover:** key personnel have 3-month notice periods, allowing time to recruit, complete Security Clearance and project handovers. We monitor staff attrition, targeting industry benchmarks (average 17.5), 2016 attrition rate [REDACTED]
- **Emergencies:** In Question 2.2.9 we cover how CODE RED alerts trigger a dedicated implementation team and process.

### **Formal internal interfaces**

Account Management teams champion client requirements across the Agency. Effective interfacing with delivery teams is critical to achieving consistently high service levels and quality including:

- **Scheduling:** following client approval of estimate/timings, Account Managers confirm resource against project deadlines using our Business Planning Process
- **Project briefing:** face-to-face sessions ensure cross-team briefing
- **Daily SCRUMS:** during AGILE projects
- **Key stage presentations and QA checks and approvals:** part of our Digital Marketing Quality Management Process (Question 2.2.8) involving Team Leaders
- **Task tracking:** Basecamp used daily to list tasks, assign ownership, collaborate over solutions, track issues and confirm completion
- **Weekly project status:** Weekly production meetings with Account Managers and Team Leaders covers delivery against timings, status reports and risk logs
- **Project de-brief:** internal review of project delivery and results feeds into Continuous Process Improvement
- **Account Huddles:** monthly meetings cover ongoing/planned projects for each Public Body - identifying learnings and scoping innovation and avoiding duplication
- **Team Leader meetings:** Group Account Directors and Account Directors attend monthly all-department Team Leader meetings. Each department delivers presentations and submits agenda to share knowledge and resolve issues.

### **Internal standards and monitoring of approvals/sign-off**

Obtaining approvals/sign-off at key project stages is required by our Digital Marketing Quality Management Process (Question 2.2.8).

Sign-off process at key stages can vary according to the Client, in terms of:

- the number of stakeholders (internal and external)

- any guidelines, regulatory or legal requirements which may require additional compliance checks.

Project plans include appropriate time to enable the management and communication of the approval process between Client and Agency.

Effective monitoring and logging of approvals is the responsibility of Account Managers and twice-yearly they are assessed on the level at which the following duty is being performed: *“Obtain Client approval of all Agency outputs e.g. estimates, timing plans, creative briefs/work, social media proposals, strategy proposals, eCRM plans, and production outputs, including those sub-contracted to external agencies, and manage/take responsibility for all amends.”*

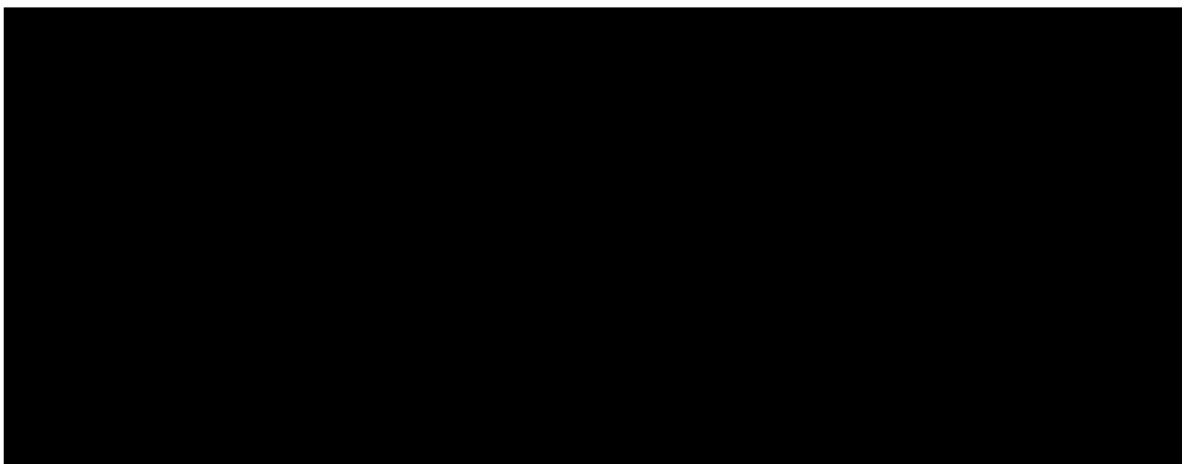
Account Manager responsibilities include:

- budget and resource tracking and documentation with internal and Public Body approvals
- documenting internal amends, Digital Checking Sheets and Team Leader QA approvals on Basecamp
- documenting Public Body approvals in writing via contact reports within 48 hours and recording on Basecamp
- management of error logs for all digital marketing, detailing all amends, who reported it, when it was reported, priority of amend, assignation of amend, status of amend, named individual correcting the amend, named individual checking the amend, date of error correction
- sending visual designs securely electronically via PDF accompanied by digital sign off sheets
- tracking changes via Word, in order to monitor all amends.

These measures ensure no work is progressed without appropriate Public Body sign-off.

### **Complaints and escalation procedure**

If no resolution found via day-to-day team:






### **Account Managers – training and performance monitoring**

Account Managers are trained on general account management skills, as well as the specific requirements of Framework Public Body projects.

#### **Induction**

Our induction programme (for new staff, contractors, new staff to a team) covers Framework Account Management, delivered via handbooks and 1:1 coaching by assigned 'buddies' and Line Managers:

- Estimating and invoicing
  - clear, accurate estimating with cost breakdown as per Pricing Schedule (Schedule 2)
  - requirement for written approval and purchase order
  - invoice process and format, content and accuracy.
- Project management
  - overview of AGILE and Waterfall techniques and when to apply
  - internal Basecamp project management tool
  - preparation of project and timing plans, progress reports, risk logs
  - key processes – e.g. SLA, scope change requests, quality process, data security.
- Client and project induction
  - briefing on relevant client relationships, previous, current and planned projects, including sector, stakeholder, competitor and audience understanding.

 of new Whitespacers in 2016 rated induction “the best ever received”.

#### **On-the-job training**

Weekly team meetings, 'buddy' system and informal Lunchtime Learnings (19 sessions last year) allow knowledge sharing. Training areas include:

- Project management: AGILE and Waterfall methodologies and budget control
- Personal style/personality profiling and team-working - demonstrating a flexible and can-do approach with courtesy and diplomacy
- Developing deeper expertise of agency specialisms (e.g. user experience, content marketing, SEO).

### **External**

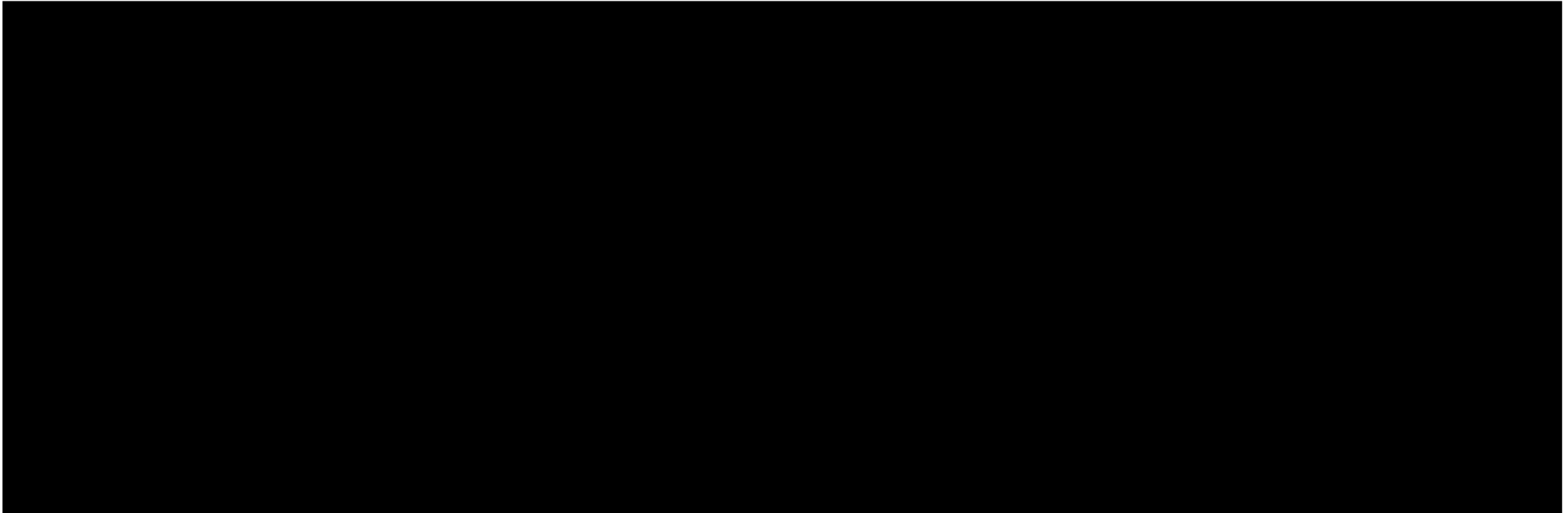
█ of the Agency received some external training last year. Account Management courses and conference attendances included:

- presentation skills and leadership
- professional qualifications e.g. IPA certificates
- conferences for latest trends – e.g. Marketing Society Inspiring Women

### **Monitoring**

- staff performance against SLAs
- client satisfaction meetings, project debriefs, satisfaction questionnaires requesting feedback on staff
- personal development plans shaped by:
  - monthly 1:1 coaching sessions
  - twice-yearly snapshots include performance and development objectives, and actions required.
- job descriptions reviewed twice-yearly.

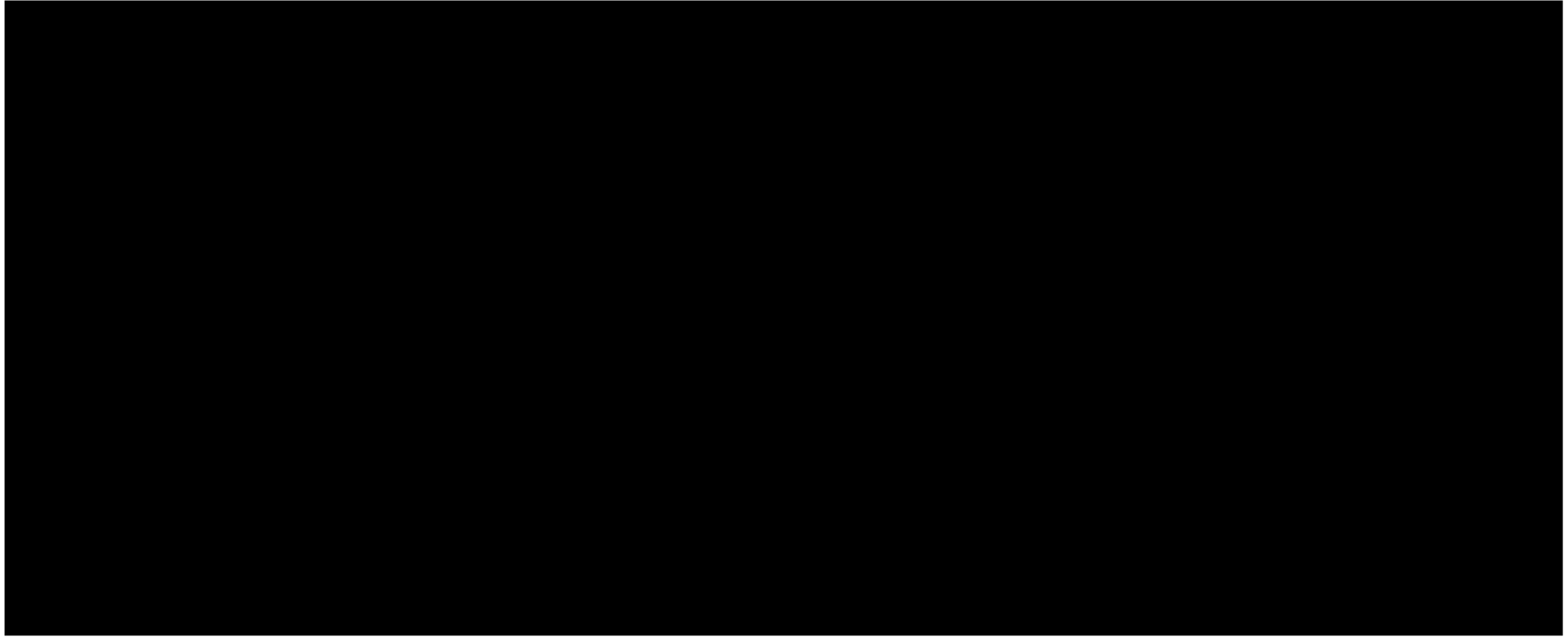
## Whitespace Senior Team Organogram – Digital Marketing

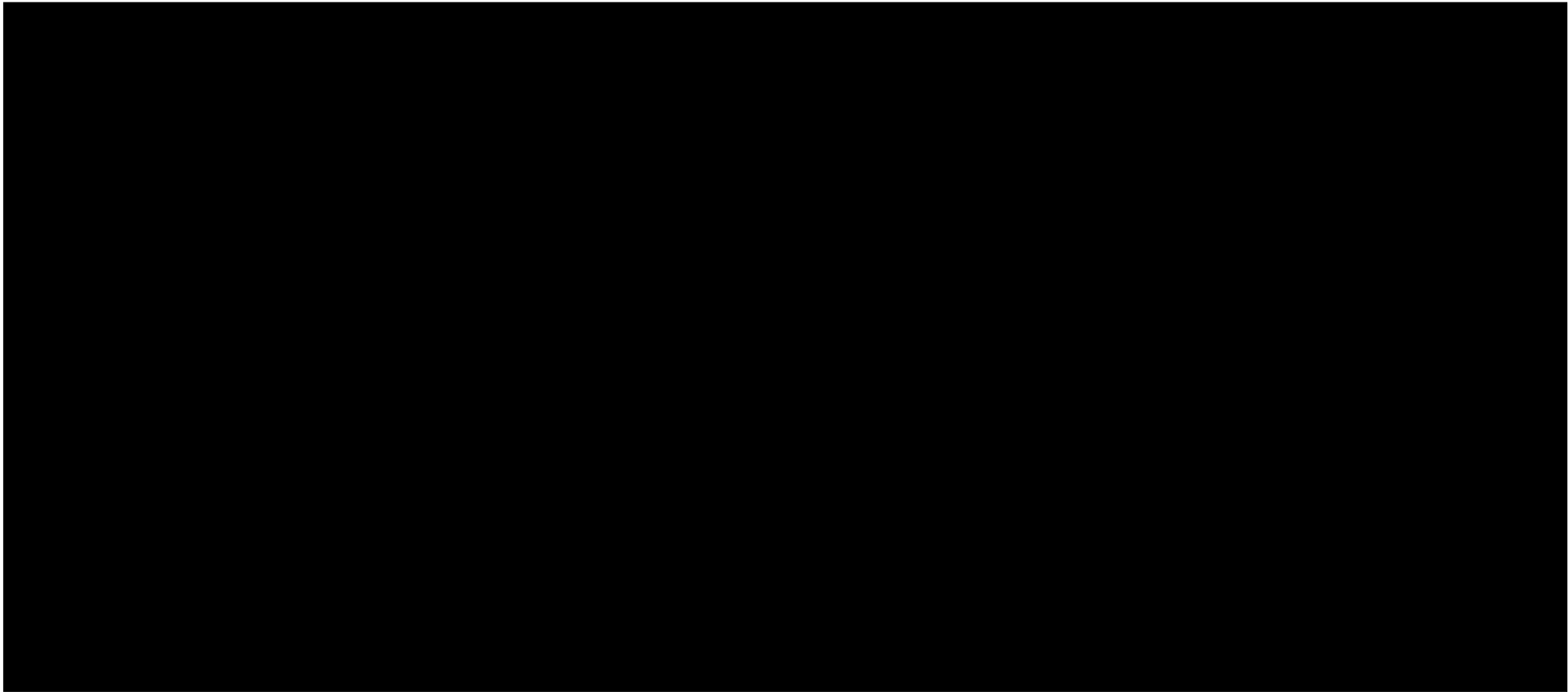


## Company structure

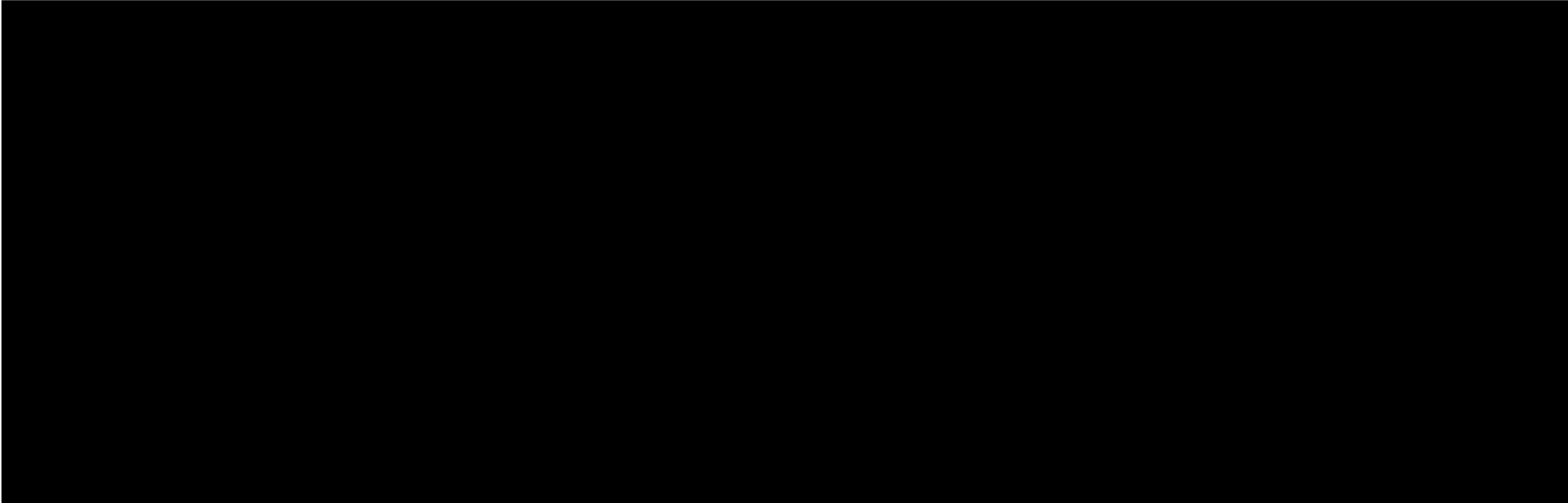
















































































































































**Question 2.3.3 (Word Count 1500: Whitespace response: 1500 words)**

*Business Management - In order to meet the contract management requirements outlined in Schedule 1 and Schedule 1A of the Entire Agreement, the Contractor must have well established formal tracking tools and processes to deliver the service, ensuring business continuity at all times. These must be used as a formal monitoring mechanism within your organisation. Please provide a detailed breakdown of your processes for tracking and delivery, paying particular consideration to the following:*

- details of all tools and processes to track and report on progress of tasks and how you keep abreast of the latest tools and technologies in the sector;*
- details of the management reporting arrangements employed to monitor tasks;*
- details of how these outputs will contribute to the management of risk and inform future activities; and*
- details of formal methods/process for identifying and addressing errors or under delivery including how and at what stage the client is informed.*
- provide examples of the management information and details of any additional management information that will be available, including frequency. Outline how all of this will be used to identify and manage activity across the framework.*
- details of any business continuity management standards applicable e.g. ISO 22301, and the processes and procedures in place to ensure the service is delivered in the event of an emergency situation occurring.*

**Tracking task progress**

Projects are managed by dedicated Account Managers who break projects into tasks and stages, delivering project plans including stakeholder inputs, internal and external quality management checks for Client approval.

Projects are managed through Basecamp, an online collaboration tool providing:

- task visibility
- progress-tracking - individual tasks
- whole project view
- audit trail for every action - comprehensive, real-time, online
- secure access - browser-based and smartphone app.

Public Bodies can be granted full visibility via secure access to Basecamp.



## Latest technologies

██████████ (Senior Digital Media Producer) with CV at Question 2.3.2 tracks Basecamp functionality updates, reviewing updates before sharing and training the full team. Twice yearly reviews of our full toolset include a Basecamp audit.

## Management reporting of tasks

Basecamp allows for dash-boarding by project, Whitespace and Public Body. Tasks completed, tasks due, milestones completed, and milestones due, can all be indexed against completion/due date/time and percentage of overall task. Reports are analysed weekly for all projects, and daily for projects within 10 working days of completion.

Where targets are not being met:

- internal Error Resolution Plans are agreed
- flagged in project's Risk Log
- communicated to Public Bodies as per escalation procedures.

## Contribution to management of risk and informing future activities

Task tracking data:

- informs future project plans to reduce risk of repeated underperformance
- informs Process and Risk Framework for process improvement
- is used to prepare risk assessments with Public Bodies, using the following template:

Risk and severity	Probability	Impact	Mitigating action(s)	Owner	Timing
e.g. Management Information (MI) shows approval milestones are not being met.  High severity.	Medium	High	Whitespace to work on client site during approval period to facilitate process face-to-face with multiple stakeholders.	Account Director	Key dates

On project completion, risk logs, management information, internal and external debriefs are analysed to inform updates to structure, tools, process, performance and training.

Recently we needed to migrate hosting for Scottish Government's scotland.cn site. Our Risk Log identified potential for communication issues, so we identified a Mandarin speaker to mitigate risk.

## **Errors/under-delivery**

### **Avoidance**

Our initiatives to avoid errors and under-delivery include:

<b>Error avoidance</b>	<b>Under-delivery avoidance</b>
Induction and training (Question 2.3.2)	Project management and contingency planning (Question 2.3.2)
Delivery processes (Question 2.3.2)	Business Planning Process (Question 2.2.8)
Quality Management Checks and approval processes (Question 2.2.8)	Business Continuity (see below and Question 2.3.4)
	Quality Management Checks
	Risk-logs available on client extranet

Exception Reporting Process applies to increased risk of error/under-delivery:

- escalation of risks flagged to Public Bodies immediately:
  - by telephone call/email from Account Director if risk moves to medium;
  - by telephone call from Group Account Director if risk moves to high.

### **Identification/communication**

Our Digital Marketing Quality Management Process identifies errors before work is sent to Clients. Spot-checks and testing is run following Client approval and when live, e.g. Head of Digital Marketing reviewing posts/comments on client Facebook page. Any errors identified proactively will immediately be flagged to Client.

### **Addressing**

In the event of an error/under-delivery, an Error Resolution Plan (ERP) will be agreed. Account Director will schedule client meeting covering:

- cause and implications
- error resolution tasks/monitoring
- revised timings/milestones and approvals
- assignation of responsibilities including ownership
- application of service credit mechanism
- review risk log
- debrief date
- Framework Authority notification (if required)

Updated ERP circulated within 24 hours and monitored until resolution.

### **Management information**

██████████ (Commercial Director) with CV at Question 2.3.2 will apply the Scottish Government recommended Balanced Scorecard to ensure metrics cover performance across Financial, Quality, Service and Delivery, plus specific Public Body/project measures.

The Scorecard will be tailored to meet the needs of the Authority or Public Body covering:

- metrics
- format
- frequency
- scope
- method of delivery
- circulation list
- required analysis
- review dates

Reports will be supplied at least five working days before any meeting, and within 10 days of the quarter end.

Three reporting levels will apply:

1. Framework Authority overview: all our Framework activity
2. Public Body account: all projects for a particular Public Body/cost centre
3. Public Body project: in-depth project review

The following examples (not complete list) show how we will identify and manage performance. Reports can be split by reporting level as required.

### **Delivery**

<b>Management Information</b>	<b>Evidence/Measure</b>	<b>Application to Framework activity</b>
<b>Meets strategic objectives</b>	██████████ ██████████	Evidence strategic Framework contribution – e.g. against SG National Performance Framework.
<b>On-time</b>	██████████	Insights on successful project management.
<b>Accuracy</b>	██████████ ██████████ ██████████	Avoiding legal/reputational risk.

## Service

Management Information	Evidence/Measure	Application to Framework activity
<b>Communication</b>	<p>SLA compliance. e.g. for IT support, this could include:</p> <ul style="list-style-type: none"> <li>client call/email response time</li> <li>open issues logged on ticketing system</li> <li>time to resolve</li> </ul> <p>Client debriefs, client satisfaction questionnaire.</p>	<p>Full view of KPIs against all Framework SLAs.</p> <p>Opportunities for continuous improvement.</p>
<b>Complaints, issues, disputes</b>	Complaints, response times, outcomes, client feedback.	Plans to avoid further issues.
<b>Business Continuity plans</b>	Plans for Whitespace and subcontractors. Test and incident log.	Ensure resilient service provision.
<b>CODE RED incidents</b>	Incident log, debrief reports, circulation list.	Shared learnings for prevention and actions.
<b>Geographic support</b>	Resource provided on client-site.	Equal service provision across Framework.
<b>Call-off-contract participation</b>	ITTs received, declines, submissions (including rationale).	Maintain fair, transparent, competitive Framework.

## Quality

Information requirement	Evidence/Measure	Application to Framework activity
<b>Meets requirements</b>	<p>Client satisfaction, review meetings, questionnaires.</p> <p>Project compliance with official standards e.g. Digital First Standards, High Level Operating Framework.</p>	<p>Ensure equal service to Public Bodies regardless of spend.</p> <p>Ensure delivery within overall Framework requirements.</p>
<b>Sustainability</b>	E.g. environmental and community measures including utility consumption, carbon footprint, waste disposed.	Measure Framework contribution to SG Sustainability Plan.
<b>Best Practice Employer</b>	Attrition rates, average length of service of key staff, Best Companies independent accreditation, training delivered, internships offered.	Contribution to SG National Performance Framework.
<b>Proactively supporting Best practice for clients</b>	Number of written client briefings or training sessions covering best practice, innovation, emerging technologies, market developments and cross Framework learnings.	<p>Opportunities for:</p> <ul style="list-style-type: none"> <li>service improvement</li> <li>enhancement through innovation.</li> </ul>

## Financial

Management Information	Evidence/Measure	Application to Framework activity
<b>Financial stability:</b> <ul style="list-style-type: none"> <li>• <b>Whitespace</b></li> <li>• <b>Subcontractors</b></li> </ul>	Audited accounts.  Financial stability report provided by accountants, Chiene and Tait.	Financial stability enables us to offer a significantly discounted rate card for call-off contracts.
<b>Total spend with Whitespace</b>	Spend statement covering invoices, third party costs, time spent against estimates, estimates approved, estimates declined and estimates waiting approval.	Comprehensive transparent view of all completed, planned and projected activity.
<b>Total spend with subcontractors</b>	As above, split by subcontractor.	As above. Ensure compliance with open tendering legislation.
<b>Value for money savings</b> <ul style="list-style-type: none"> <li>• <b>achieved</b></li> <li>• <b>missed</b></li> <li>• <b>future opportunities</b></li> </ul>	Work invoiced at discounted rate card.  Equivalent private sector value of client training/knowledge sharing or no-cost partnerships.	Transparency around value delivery, maximising future opportunities.
<b>Invoicing</b>	Invoice log grouped by 30, 60 and 90 days, issues raised, resolution time.  Debtor report – Whitespace to subcontractors.	Proactively identify Whitespace invoicing errors.  Ensuring invoicing SLA achieved.  Monitor Whitespace obligations to pay subcontractors within Framework requirements.

## Project outcomes

Frequency of project reporting varies by requirement, normally weekly for campaigns for first four weeks, then monthly to identifying mid-flight optimisation. A three-month collaborative multi-agency post-campaign launch review collates/analyses/reports and makes recommendations.

Information requirement	Evidence/Measure	Application to Framework activity
<b>Project optimisation</b>	Examples of improvements made during planning and delivery.	Apply learnings to new projects across Framework.
<b>Channel performance – website, email, social media, partnerships.</b>	e.g. reach, traffic, interactions, SEO rankings, referrals, engagement, goals, open rates, click through rates, likes, subscribes etc., independent tracking and overall ROI.	Benchmarking, opportunities for optimisation, insights around ROI.

## Reporting dashboard

The following example dashboard of the Balanced Scorecard would be adapted to the requirements of the Authority/Public Body.

We applied this for a financial services client. Many metrics were good to excellent, but satisfaction was average. New monthly meetings have rectified this.

Measure	KPI	Target	Performance	Our comments	Client comments	Recommended improvements
<b>DELIVERY</b>						
On-time						
Meets strategic objectives						
Accuracy						
<b>SERVICE</b>						
Communication						
Complaints/issues/disputes						
<b>QUALITY</b>						
Meets requirements						
Sustainability						
<b>FINANCIAL</b>						
Invoice accuracy						
Added value						
<b>PROJECT/CLIENT MEASURES</b>						
Confirmed separately						

## Business Continuity (BC) Plan

Our BC Plan:

- proactively identifies and minimises potential threats
- builds resilience by ensuring we keep critical functions running, downtime minimised and recovery time improved
- is easily presented in training – e.g. new Whitespacer induction
- is simple to read and follow during incidents
- is fast to update (we update the plan every month) and review it every six months.

To create a highly resilient business we have no dependencies on our office or any IT hardware plus an excellent contractor network for cover should an event impact many staff e.g. an infection.

Our plan includes a priority list of individuals who take on two key roles:

- BC Leader responsible for delivering client work
- BC Fixer responsible for resolving the BC issue.

Splitting these responsibilities ensures we deliver work for our clients, whilst also resolving the continuity issue.

The plan is tested six monthly - detailed in Question 2.3.4.

BC is more than just a plan, it is an ongoing management process. As a growing SME we are now aiming for ISO 22301 certification in 2017.

If emergency situations affect BC of a Public Body (rather than ourselves), we will implement our CODE RED process (see Question 2.2.9).

**Question 2.3.4 (Word Count 1200: Whitespace response: 1,199 words)**

*Business Continuity and Cyber Resilience - A key element of the service will be the Contractor's Business Continuity in respect of Cyber Resilience services.*

*Tenderers should provide details of any standards applicable in this area (e.g. ISO 27001, ISO 22301, ISO/IEC 20000, Cyber Essentials/Cyber Essentials Plus or their equivalents), advise whether any certifications are held and provide details of any plans to achieve any certification.*

*Tenderers must also describe their procedures to ensure continuity of service and protection against cyber-attacks, paying particular attention to the following:*

- details of processes followed including those for assessing future risks;*
- testing of Disaster Recovery policies and procedures, including the dates, duration and frequency;*
- methods for the back-up of delivering services should an incident occur including manpower and access to equipment;*
- methods in place to mitigate against cyber-attack and crime using online technologies including processes relating to Boundary Firewalls and Internet Gateways, Secure Configuration, Access Control, Malware Protection and Patch Management;*

*Tenderers should refer to the UK Governments Cyber Essentials Scheme and consider the information included within the scheme when providing their response to this section.*

*(<https://www.gov.uk/government/publications/cyber-essentials-scheme-overview>)*

*Where applicable, Tenderers must ensure that any sub-contractors appointed to deliver any of the services have Business Continuity and Cyber Resilience measures in place.*



[REDACTED], Managing Partner oversees Board-level responsibility for Cyber Resilience and Business Continuity, and we understand related requirements in the Digital First Service Standard, and the Data Hosting and Data Centre Strategy (Scottish Public Sector).

Activity includes:

- **Cyber Resilience:** processes preventing issues which would impact service delivery
- **Business Continuity and Disaster Recovery:** processes delivering service continuity in the event of an incident.

### Assessing future risks

Our Risk and Controls Matrix is reviewed monthly at Board Meetings with all risks identified and managed. Controls are mapped to risks and assigned owners who report:

- details of the control
- type of control (preventative or detective)
- frequency of control testing or enactment
- evidence that control is effective.

### Cyber Resilience

#### **Cyber Essentials, standards and certification**

[REDACTED]  
[REDACTED]

[REDACTED]  
[REDACTED]

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

[REDACTED]  
[REDACTED]

#### **Cyber-attack mitigation – policies and training**

Our Information Security Policy is embedded in training, covering DPA, data encryption and understanding the risks of 'social engineering' attacks.

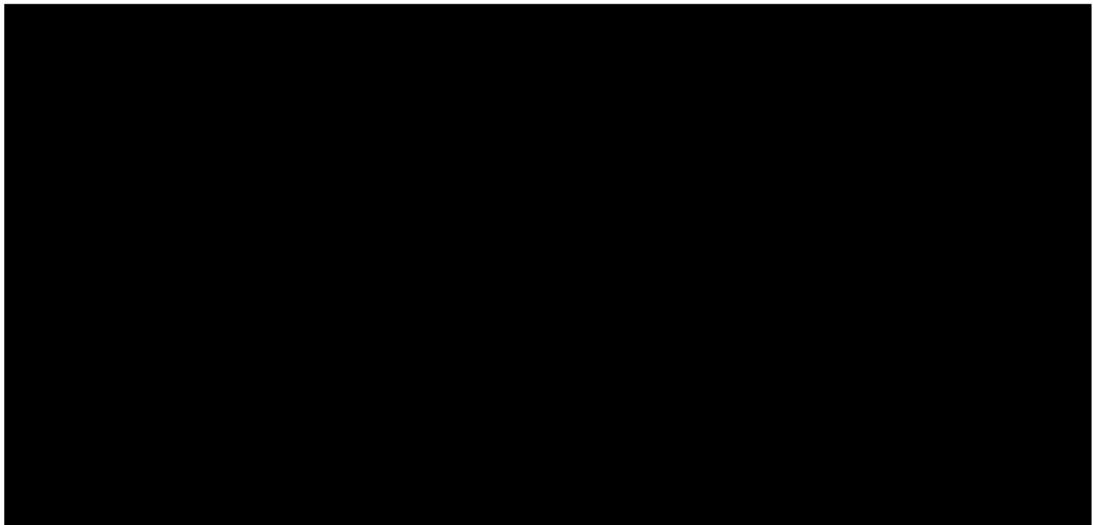
New Whitespace/subcontractors are trained on the policy and implications for their role. Policy reminders are sent quarterly through Agency-wide emails and refresher training provided annually.

The policy is reviewed bi-annually. Each Whitespace is randomly tested using a test scenario at least annually.

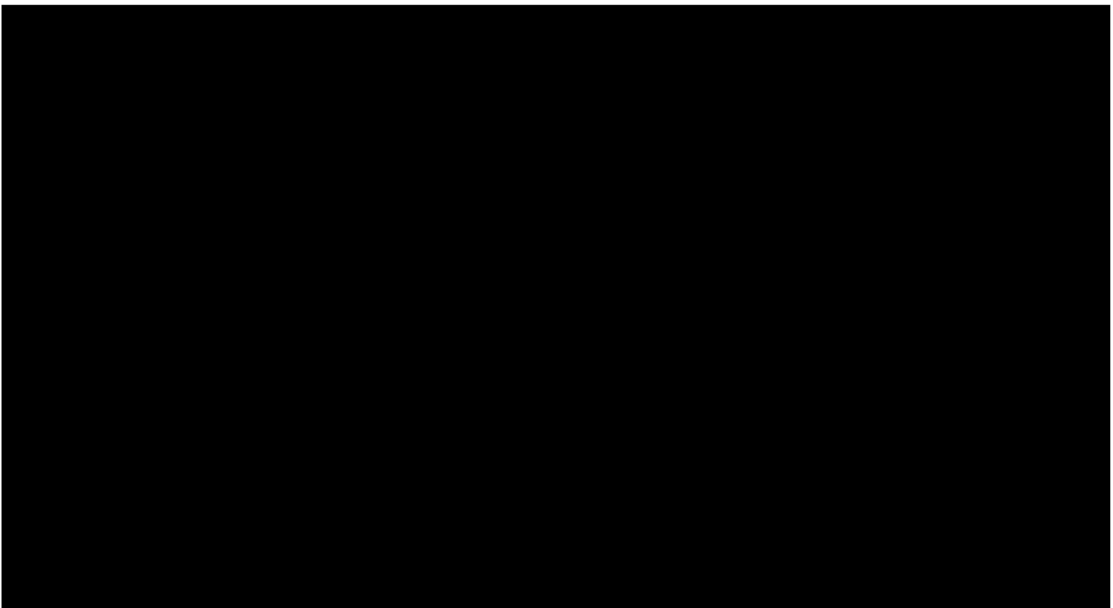
**Cyber-attack mitigation – online technologies**

Our network and devices are documented and managed in line with our IT setup, methods and processes. Policies are reviewed annually, with systems having annual external penetration tests.

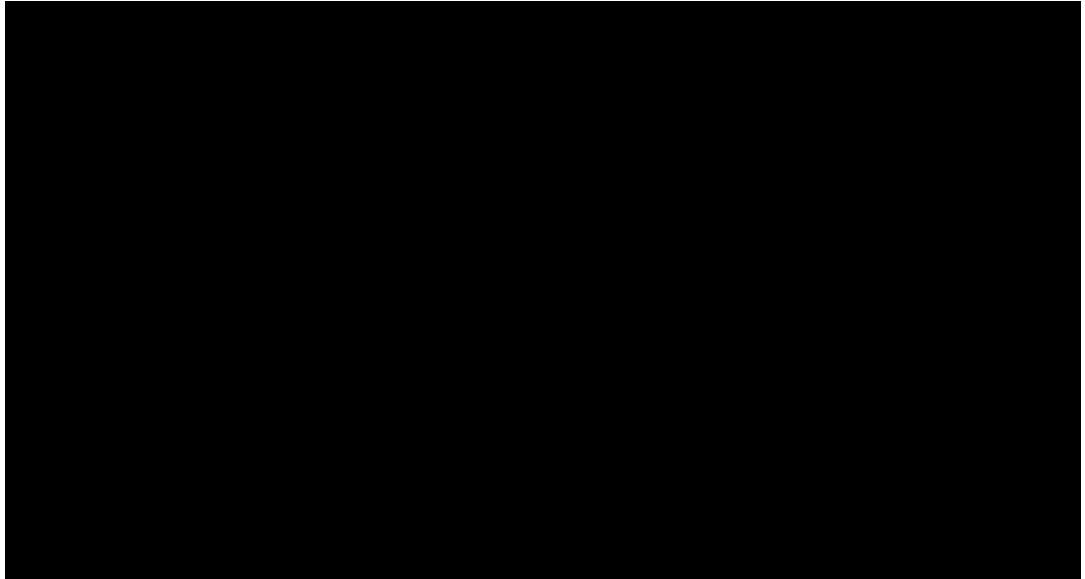
- **Boundary Firewalls and Internet Gateways**



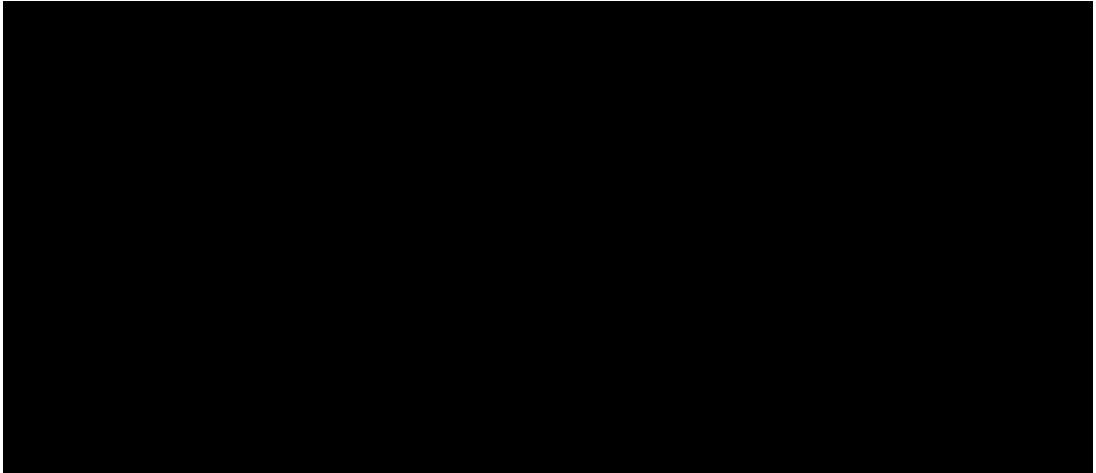
- **Secure Configuration and Back-up**



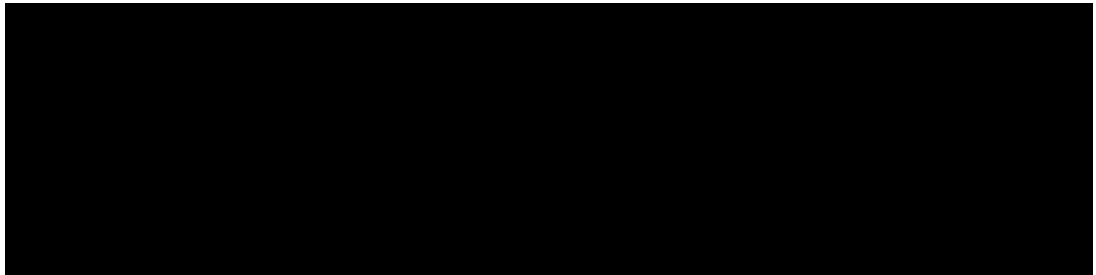
- **Access Control**



- **Malware Protection**



- **Patch Management**



**Business Continuity and Disaster Recovery**

Revamped in 2013, our Business Continuity Plan is:

- easily presented in training – all new Whitespacers are trained during induction
- simple to read and follow during Business Continuity incidents

Following audits, our clients ( [REDACTED] ) have given us very positive feedback on this plan.

To create a highly resilient business we:

- have no dependency on our physical office by syncing data to data-centres and providing laptops, so our team can work anywhere - this has been tested successfully several times
- have multiple internet connections; 30 minutes of UPS for all on-premises network and systems; laptop batteries provide built in UPS.

Our plan includes a priority list of individuals who take on two key roles:

- Business Continuity Leader responsible for delivering client work
- Business Continuity Fixer responsible for resolving the Business Continuity Issue.

By splitting these two responsibilities we continue to deliver work for our clients, whilst also resolving the continuity issue.

### **Back-up**

The plan includes back-up methods delivering services in an incident including:

- **Manpower:** Rapidly prioritising immediate requirements whilst evaluating the length of the incident. Where flexible resource is not an option, contacting recruitment agencies for additional capacity
- **Equipment access:** Offsite backups and laptops mean lack of equipment is very unlikely. However, as the vast majority of our software is licensed via the Cloud, we would purchase Apple laptops locally, so staff are quickly working on new hardware.

### **Testing**

- the plan is reviewed bi-annually and updated monthly
- it has been successfully implemented in live power-cut/outage situations
- it is tested every 6 months using an unannounced test scenario
- some tests last a couple of hours, others have lasted up to 36 hours
- the dates of the last four tests were: [REDACTED]
- tests undertaken without impact on our clients' work and projects.

Test and incidents are reviewed and logged following resolution. Reviews have resulted in significant updates to the plan - primarily around internal communication and efficiencies. We are confident in our plans.

The full Whitespace Business Continuity Plan is available upon request.

## **Subcontractors**

Any solution and/or service is only as secure as its weakest element.

We confirm partners' and sub-contractors' cyber-resilience and business continuity as part of our selection process. We will only use sub-contractors who are accredited or working towards Cyber Essentials certification. For any sub-contractor without Cyber Essentials accreditation we will agree a timeline for their completion and certification.

Whitespace (Scotland) Limited confirms that, where appropriate, we will support the Scottish Ministers policies on Sustainability and Corporate Social Responsibility in delivering the service required.



## Reward

Initiative	Implementation	Measurement
Living Wage	[REDACTED]	[REDACTED]
Pensions	[REDACTED]	[REDACTED]
Benefits	[REDACTED]	[REDACTED]

## Flexible working

Initiative	Implementation	Measurement
Flexible working	Flexible Working Policy, including flexi-time, condensed hours, career breaks.	Quarterly review: external HR Consultancy.  Uptake: [REDACTED] staff, male and female (2016)

## Personal development, skills and training

Initiative	Implementation	Measurement
Induction	[REDACTED]	[REDACTED]
Performance development	[REDACTED]	[REDACTED]
Training	[REDACTED]	[REDACTED]



Training (cont)	[REDACTED]	[REDACTED]
Leadership development	[REDACTED]	[REDACTED]
Apprenticeships/ internships	[REDACTED]	[REDACTED]

**Diversity, equal opportunities and avoiding exploitation**

Initiative	Implementation	Measurement
Zero hours contracts	All staff on uniform contracts and conditions of employment.  No staff or sub-contracted cleaners/caterers on Zero Hours contracts.	Annual review external HR Consultancy: 100% compliance (2016).
Equal opportunities/fair treatment	Whitespace Equal Opportunities; Equality & Fair Treatment and Whistleblowing Policies - promoted during induction process, Team Leader meetings and email reminders.  Whitespace will not support/do business with any supplier involved in slavery/human trafficking.	Signed Policies acknowledgements: all staff.  Statement by Supplier of compliance to the Modern Day Slavery Act 2015.
Gender balance	Commitment to Scottish Government's gender balance Boardroom target 50:50 by 2020.	Gender balance combined board/senior management level: [REDACTED]
Conflict/grievance	[REDACTED]  Promotion of Grievance Policy.	[REDACTED]  Signed Policy Acknowledgement (all staff). Annual policy review (external HR Consultancy)
Accessibility	Within constraints (Grade C listed building), ensuring 90% wheelchair accessible with lifts, wide doorways, adapted toilets.	Building specification documentation.  British Council of Offices Regional Fit Out of Workplace Award: "intelligent, functional, sustainable design" (2016)

### Communication, transparency and integrity

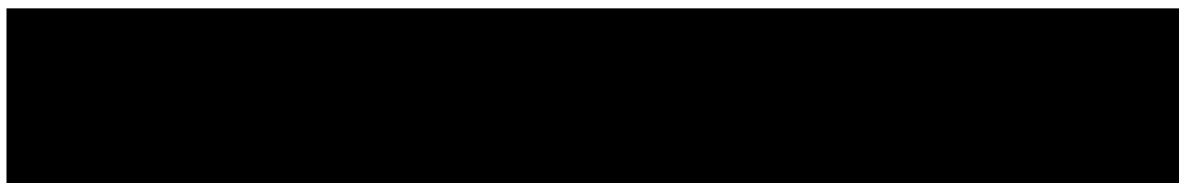
Initiative	Implementation	Measurement
Effective communication	[REDACTED]	[REDACTED]
Effective staff voice	[REDACTED]	[REDACTED]

### Wider community

Initiative	Implementation	Measurement
Environmental	Within constraints (Grade C listed building), installing e.g.: Motion sensor lighting, energy-efficient appliances.	Energy Performance Certificate Rating: 'C'.
Charity	Annual delivery pro-bono charity campaign.	Hours assigned/donations received: 127 hours donated raising [REDACTED]
Community	Free use of EventSpace (capacity 125) for creative community events.	Events held: [REDACTED]

### Planned initiatives

In 2017 we will launch:



Whitespace (Scotland) Limited confirms that, we have taken the Scottish Business Pledge and been accepted (11 February 2016).

Whitespace (Scotland) Limited confirms that, we are accredited as a Living Wage Employer (from 25 November 2015).