What is your company’s full legal name?

Does your company have a Code of Conduct / Ethics in place?

Does your company prohibit facilitation payments, including to public officials?

Please describe the proposed technology solution?

Please describe the advantages of your proposed technology solution, including any known advantages over in-house built systems, including observable outcomes to operational efficiencies?

Please explain your market standing and any competitive advantages that are unique to your solution. What unique benefits will make your solution more likely to succeed?

Please detail any enhancements to your technology solution in the last three years?

What is your retention rate, and how is it measured? Please provide details on global and UK rates.

What support will you provide in the initial set-up phase? How long do you expect this phase to take, and what involvement is required from employees of Insight Investment? If a project plan for implementation is available, please attach it to your submission.

Thinking of your most and least challenging onboarding experiences with current clients, what experiences can you share with Insight that will make your solution proposal for Insight more likely to succeed?

How would you handle a significant change to file formats? Is this process managed by Insight, and if so, how much support would be available?

What is the most likely cause of error, and what is the likelihood that it will be discovered before data is published? What controls do you have in place to prevent this?

How do you accommodate changes in the data or data structures required by external databases? How quickly are these changes accommodated, and how much action is required by Insight in these scenarios?

Please provide a quote for: (1) Implementation costs; (2) Ongoing costs (Please ensure that the total price breakdown equates to the total price); and (3) provide cost for individual licenses, so we can understand how much each license for each module costs per year.?

Please provide an indication, if any, of the costs of system upgrades.?

Please confirm that the above costs are complete and that no other expenditure will be required to implement the proposed solution (If not complete, please outline the additional costs and the reasons for these)?

The number of marketed strategies / profiles across consultant databases may fluctuate during the course of a billing cycle to accommodate for product launches and deactivations. Please explain how you would accommodate a mid-cycle change to the number of strategies / profiles, both as increases and as decreases in quantity, in terms of billing. If billed in advance, please specify how this would be managed on a pro rata basis (e.g. refund, etc.).?

What guarantees does your company offer in terms of pricing? Please specify how Insight would be notified of any fee increase, and what the limit of those increases would be. Implementation?

What is a ‘standard’ implementation cycle, including data conversion, delivery and installation, for your standard product?

What is a ‘standard’ implementation cycle, including data conversion, delivery and installation, for a customized version?

Please describe the support that would be provided to Insight, within the contract price, during a standard implementation?

Please provide details of your proposed implementation plan, for a standard implementation, including the resources and timescales which you would plan to follow.

What split of resource would you advocate between Insight and yourselves for this implementation?

What testing strategy would you advocate?

What procedures do you recommend / support for testing links to third parties?

What training will be required for Insight staff to use the system (both initially and ongoing)? What different levels of training would be required for different users of the system?

Can the training be customized to reflect Insight’s use of the system?

At what location(s) is your software developed, enhanced, supported?

How much support would you expect to provide to Insight on an on-going basis?

Please provide details of your support organization (Please include an organization chart, number of staff showing skill categories, type of products supported, and number of customers supported)?

Provide details of your current Service Level Agreements (‘SLAs’) for support?

Please define the Help Desk / remote support facilities provided by your company?

During what hours is your company’s Help Desk available for contact / queries?

Where is your company’s Help Desk located?

What are your company’s emergency contact procedures?

What customer service performance indicators does your company monitor?

Please outline the details of your company’s problem resolution and escalation procedures?

What are your procedures for ongoing relationship monitoring including oversight and escalation?

What is your company’s policy regarding system upgrades? (Please include how often are system upgrades issued, and what level of support do you provide for older versions). Information security?