

University of Manchester

Tender Reference:

2025-3095-DCESP-VP-MW

Tender for Digital Customer Experience Strategy Partner

PART C – TENDER SPECIFICATION

Note: You should read and respond to this document as indicated.

C. Tender Specification

1. Background information on The University of Manchester

The University of Manchester was the first and most eminent of England's civic universities; our earliest roots can be traced back to 1824. The university, in its present form, was created in 2004 by the amalgamation of the Victoria University of Manchester and the University of Manchester Institute of Science and Technology (UMIST). It now has over 13,000 staff and more than 44,000 students from 170 different countries, making it a truly international institution. The University has a global reputation for education and innovation that resonates across the world, with a rich history of attracting brilliant minds to the University. We have 25 Nobel laureates among our current and former staff and students, including Ernest Rutherford, Arthur Lewis, and most recently, Andre Geim and Kostya Novoselov.

Part of the prestigious Russell Group of UK universities, we are one of the UK's largest single-site higher education institutions with a broad disciplinary base across STEM and the arts and social sciences that enables us to offer more than 1,000 graduate and post-graduate degree courses to students. We are consistently ranked among the top universities in the world across all significant international rankings:

- 6th in the UK (QS World University Ranking 2025)
- 7th in Europe (QS World Rankings: Europe 2024)
- 52nd in the World (Academic Ranking of World Universities 2024)
- 53rd in the World (Times Higher Education 2025)

We are the only university to consistently rank in the global top 10 since the ranking's inception. International businesses, charities, governments, and universities turn to Manchester for its expertise – from leading the European renaissance in industrial biotechnology to broadening access to cancer services in India, helping more than 5,000 children with leukaemia receive treatment.

We are recognised globally for our pioneering research, breadth of teaching and learning, and for our commitment to social responsibility. The world's big challenges demand urgent action – we're working across boundaries and disciplines to create healthier, more equal futures; helping to eradicate poverty; ensuring energy supply for future generations; and protecting our planet for the years to come.

We are the most popular university in the UK for UCAS applications and have around 17,000 international students in our total student community, and more than 500,000 alumni. Our students come to live and study in Manchester and learn to be global citizens. They are attracted by our powerful sense of place, our academic ranking, the diversity of our courses, the impact of our social responsibility and by the city's rich cultural and sporting heritage.

The university is an anchor institution: critical to the economic, social, cultural and environmental wellbeing of the city and our region. The University is committed to its local community, and we recognise the importance of our civic role. In collaboration with Manchester Metropolitan University, Royal Northern College of Music, University of Bolton and the University of Salford, we have developed a joint Civic University Agreement with the Greater Manchester Combined Authority (GMCA) and its ten local authorities to drive social and economic change in the city/region. We make a significant contribution to the area's cultural credentials, with our own Manchester Museum, John Rylands Research Institute and Library and the Whitworth among the city's cultural landmarks, and the iconic Lovell Telescope just a short drive away at our Jodrell Bank Discovery Centre.

Looking ahead, it's our vision to be one of the world's leading universities in a challenging global environment and to be recognised across the world not just for the excellence of

our people, research, learning and innovations, but also for the benefits we bring to society and the environment. To this end, we are working with students, staff, alumni and partners to develop our 10-year Manchester 2035 Strategy, which will be launched in 2025. It will shape our ambitions and activities for the next decade – identifying what we want to be, where we want to be and mapping the path to realise those ambitions and benefit the communities we serve.

2. Background information on Project

3. Project Overview

The University of Manchester is embarking on a transformational programme to redefine how we engage with our external stakeholders in an increasingly digital world. While initially envisioned as a project to improve our website, early discovery has highlighted the need for a much broader investment in both technology and business capabilities. This programme will focus on enabling a future-facing, cohesive digital experience for a diverse range of audiences, including prospective students and colleagues, lifelong learners, research partners, donors, alumni, and others.

Our ambition is to deliver a digital engagement approach that not only enhances our online presence but also integrates supporting tools and processes to manage relationships effectively across stakeholder groups. Achieving this requires a significant investment in several key areas, including customer relationship management (CRM), artificial intelligence and personalisation, advanced content management systems, and business operating model enhancements. Some of these investments have already begun, but it is essential that we adopt a coherent, comprehensive approach underpinned by a single, robust strategy. By adopting this holistic approach, we aim to provide a seamless and highly personalised digital experience that meets the needs of our varied user groups, positioning the University as a leader in digital engagement. This will allow us to:

- Improve performance across student and colleague recruitment
- Increase revenue generation through a range of new flexible learning pathways
- Optimise existing revenue streams
- Improve operational efficiency
- Strengthen our management of philanthropic and donor relationships
- Grow our research partnerships and increase collaboration with partner and commercial organisations looking to benefit from the academic insight, workforce development, and expertise that the University can provide.
- Strengthen our global reputation and enhance rankings performance

This work is fundamental to securing our position as a leading global University that has innovation at its heart. This positioning will be critical to ensuring that we are well placed to meet the challenges of financial sustainability that face the Higher Education sector. It is therefore a key priority at the very highest levels of the institution.

Scope and focus

This programme will focus exclusively on external engagement. Services provided to current students studying at the University are explicitly out of scope. The priority is to transform how we identify, understand, and engage with our audiences before, during, and after their formal relationship with the University. Our broad key audiences include:

1. Prospective Students: Individuals considering undergraduate, taught master's, or postgraduate research programmes, seeking information on courses, admissions, fees, funding, and student life.

2. Current Students: Enrolled students requiring access to learning resources, research facilities, academic support, and student services. (Is it worth repeating here that this audience is out of scope?)
3. International Students: Students from outside the UK looking for guidance on studying at the University, including accommodation, finance, scholarships, and arrival procedures.(given that current students are out of scope, should this audience be called "Prospective International Students"?)
4. Researchers and Academics: Academic professionals and researchers interested in exploring research areas, accessing research platforms, and collaborating on projects.
5. Business and Industry Partners: Organisations and industry representatives seeking business engagement, policy partnerships, or opportunities to collaborate and donate.
6. Alumni: Former students wishing to stay connected, access alumni benefits, participate in University events, and contribute to the University community.
7. Visitors and the General Public: Individuals interested in campus facilities, cultural institutions such as the Manchester Museum and the Whitworth Art Gallery, and University-hosted public events and heritage initiatives.

To achieve our objectives above, we need to develop:

- A comprehensive user segmentation and understanding of user needs in the context of UoM's digital architecture;
- A clear vision for what we should achieve through our digital engagement strategy;
- A clear picture of the capability shifts that must occur, to enable that vision;
- Enterprise mapping across key capabilities to more clearly articulate the role that the website, social media, apps, etc, play in the context of user experience
- A high-level roadmap to build the capabilities necessary, to support our goals, including tools, processes and systems. .

The programme will undertake good practice research across other HEIs and outside the sector, to explore both technological advancements and the necessary changes to our business operating model to deliver a modern, flexible, and scalable approach to digital engagement.

Our approach to delivery

To help us shape this ambitious transformation, we are seeking an experienced strategic partner. This partner will work closely with the University to develop the strategy that will underpin the programme. We expect the development of that strategy to take several months, and to set out a vision that will take a number of years to fully implement.

In parallel to the strategy development, we therefore also intend to deliver a series of short-term improvements to priority areas of our website by Autumn 2025, when we will launch our new Manchester 2035 strategy. A separate tender exercise will be launched in the new year to select a second partner to deliver those early improvements. We expect those early changes to focus on:

- working with external partners to improve information architecture, user journeys, look and feel, searchability and accessibility;
- working with partners to enhance our security and accessibility in line with UK legislation.
- reviewing the range of websites in our wider ecosystem with a view to rationalising them into a more singular, unified University website that represents our One University goal;
- reviewing our operating model and resources and developing new governance.

Due to the ongoing nature of the project, we would expect the Supplier to have an ethical wall in place. The University would expect that Supplier personnel currently engaged with the University would have a segregation of duties in that the bidding team for future procurements would be remote from the staff currently engaged on University projects.

4. Specification

4.1. Overview

The University invites bids that will provide the best solution to meet the need identified below.

Specific and detailed responses to each of these sections are required and should be appropriately numbered to facilitate tender adjudication.

Please provide sufficient detail in the response to allow the University to make an informed decision without having to request additional information. Conversely tender responses should not be padded out with irrelevant data simply to make it longer.

Any references made externally should only support an answer which is given. The University does not expect to go looking for an answer in external documents provided. The University reserves the right to mark any answer which does not meet this specification as non-compliant and could result in rejection from the ITT.

The budget for this work will amount to circa £200,000 exc VAT.

4.2 Specific requirements

The problems we must resolve:

1. The University does not have an external-facing digital customer experience strategy; this results in a poor user experience which makes us less attractive to potential students, students, colleagues alumni, potential donors and strategic partners. We are looking to address the problems caused by the proliferation of website pages, poor quality website experience, our lack of AI-readiness, poor back-end functionality e.g. CRM, our need for an effective operating model to support the new website and digital strategy, enabling capabilities and governance. Our new strategy must address these issues and enable us to meet our vision as set out below:

"We will create a world-class website and external digital presence for The University of Manchester that provides a compelling, inclusive, personalised experience to all our stakeholders, wherever they are in the world. Following the principles of service excellence and 'one university', our digital interaction will be commercially-grounded, simple and seamless – getting users to the next step in their digital journey as effectively as possible. Our website will be the cornerstone of their lifetime relationship with us, wherever they are in their learning journey. In support of our 2035 ambitions, our website will strengthen our reputation by telling the Manchester story in a way that is meaningful to all our stakeholders".

2. The University does not have the resource, within a short timescale, to carry out the research needed to inform the development of a new digital engagement strategy. The strategic partner will carry out this research in accordance with user needs. We want to ensure we focus our research on user experience, developing the ability to deploy a cradle to grave approach personalised to each user. As part of this, we hope to enable capability in cross-selling across our portfolio of courses

and other commercial services, such as research-led consultancy and workforce development. Our current website and digital capability does not enable us to do this. We lack both the front or back-end capability to meet lifelong learning or transnational teaching ambitions.

3. The University website is not set up to achieve philanthropic aims and grow relationships with external partners.
4. The University website does not reflect user needs – it is outdated, overly busy, hard to navigate and contains excessive detail. Ultimately this damages our reputation, which in turn impacts research funding and our ability to attract top talent to enable and deliver teaching and research excellence.
5. The University website and other enabling capabilities are not compliant with UK accessibility legislation and has critical security vulnerabilities.
6. The current website does not enable data capture or sophisticated user experience feedback, which is used to deliver a personalised, user-friendly experience integrated with core systems. This also impacts continuous improvement capabilities. Fundamentally, we need to shift to a more Agile and user-focused approach to developing, managing, and enhancing our digital offer for our customers.
7. Technical limitations with the website adversely affect the effective measurement of campaigns, ROI and ability to quantify Cost per Acquisition (CPA). This means campaigns are not optimised in a sophisticated way and spend is not as effectively allocated as it should be.
8. The absence of a unified digital content strategy supported by clear governance and an effective operating model has led to significant challenges. Tasks are frequently duplicated, workflows are inefficient and cumbersome, and our ability to deliver service excellence with agility is compromised. Addressing these issues is critical to ensuring the right people are in the right roles and performing the tasks necessary to achieve our strategic objectives.
9. The implementation of the Digital Customer experience Strategy must be integrated with other university initiatives:

Accordingly, we are seeking to procure support in developing a comprehensive and sustainable strategy for our digital customer experience. Your proposal should clearly address the following 4 deliverables and provide a plan outlining how each will be approached with an estimated time to deliver.

Work Package 1 (required within 1 month of contract) – Recommended User Segmentation.

Customer/ user needs must be placed at the heart of the new programme. Our customer groups are varied and diverse, including (for example) prospective undergraduates; prospective students for our expanding executive education and lifelong learning course offers, potential donors and philanthropists; research partners; clients for consultancy and advisory services; and others.

The strategy partner will therefore be required to produce a robust user segmentation, to help us understand the different groups of customers who may use our website and associated digital services, the needs they have, and what 'good looks like' for them. This

analysis should underpin the strategy and will also be used to drive the short-term improvements that we will deliver to our website.

This analysis must therefore include:

- A customer segmentation model, setting out who our key user groups are.
- A description of the key characteristics of those user groups.
- A vision statement and articulation of the epic user needs for each segment, articulating what our digital offer should achieve for them.
- An outline set of objectives and performance metrics that could be used to assess the effectiveness of the user experience provided to customers within the segment.

While the University has a range of student insight available to it, we would envisage that the segmentation will require further user research to be undertaken to ensure that the proposed segmentation is robust, evidence-based, and reflects real user needs among the target audience. The strategy partner will be expected to undertake that research, and to present a summary of the evidence that underpins the proposed segmentation model.

We expect the vision for our key user groups to be ambitious, and to require a significant shift in our digital capability. Delivering that will not be a rapid task. In addition to the segmentation model, we are therefore also asking the strategy partner to produce a maturity model that describes the key shifts that are needed in our capability, as we move towards the vision. That maturity model should be capable of use to assess, target and prioritise future change.

This is required within 1 month of the contract as it will be used as the basis for tendering for a delivery partner to work on the delivery of early, high priority improvements to our website and user journeys by Autumn 2025. Those improvements will be driven by the segmentation model developed under this tender.

Work Package 2 – Operating Model

This work package focuses on identifying and defining the changes required in our business operating model to deliver the vision for enhanced digital engagement. Building on the outcomes and user needs identified in the first work package, this phase will analyse how the University's current processes, structures, skills, and ways of working need to evolve to meet stakeholder expectations effectively. This must:

- Include an As-Is assessment of our current model.
- Articulate the capability needed in the future, to deliver the vision.
- Provide gap assessment against the current and To-Be models.
- Generate a debate with us about the choices needed to address the gap.
- Outline the high-level controls and working practices needed to create a digital service management model.
- Propose an organisational data management strategy and supporting capability to support/enable our goals.
- Propose how we develop the organisational ability to be user-centric in our digital content strategy

Work Package 3 – Technology Landscape / Logical Model

This work package will define the technological capabilities required to underpin our vision for a modern, engaging, and scalable digital experience. It will build on the user segmentation and maturity model from the first work package to identify and prioritise the systems, tools, and integrations necessary to achieve our goals. Please note that we are not asking the supplier to carry out a product selection exercise, but rather to frame the broad set of technical capabilities that will be required to deliver the vision, and to

articulate the key principles or approaches that should underpin our delivery of those capabilities. The University has already been developing product roadmaps that help to articulate the strategy for our IT estate, and these will provide the starting point for this work. The output from this work package must:

- Include an As-Is assessment of our current model.
- Articulate the capability needed to reach a best-in-class 'To-Be' operating model.
- Provide a gap assessment against the current and To-Be operating models.
- Address current and emerging technology trends (including the role of AI) and describe how they can be incorporated in the To-Be model.
- Provide commentary and critique on our indicative digital architecture with the goal of generating debate / challenge on our current direction.
- Synthesise these outcomes into a proposed technology strategy.

Work Package 4 – Roadmap to achieve TOM and Technology Landscape

The final work package will synthesise the findings and recommendations from the previous phases into a cohesive and actionable high-level roadmap. This roadmap will outline the steps required to deliver the programme's vision, providing clear guidance on sequencing, dependencies, and priorities. At this stage we do not expect a detailed technology roadmap but need a roadmap that at a logical level:

- Brings together the necessary steps to advance through the maturity model outlined in WP1.
- Provides a sequence, including pick-up and stopping points to achieve appropriate levels of maturity at an organisational level.
- Provides a single coherent package that can be played back to senior stakeholders as a summary of the engagement designed to elicit and inform decision making.

Please note: Broader recommendations on critical work packages necessary to enable the outcomes espoused, are welcomed.

4.3 Structure and evaluation of bids – Please see the separate attached Bidders Response Document.

Please ensure that bids clearly set out any client responsibilities that you will require the University of Manchester to meet.

5. Pricing – Please complete the separate attached Pricing Schedule document

- 5.1. We require a fixed price in UK Pounds Sterling. Your tendered price(s) must remain valid for acceptance for not less than 90 days from the tender closing date.
- 5.2. Charges should be plainly and legibly presented. Costs should be broken down by individual element.
- 5.3. The University does not enter into post tender negotiation on price so your response should contain your best offer for the requirement specified and will be evaluated accordingly against any other offers received. If you wish to offer alternatives, please quote these as separate options in your response.
- 5.4. Invoices should be in sufficient detail for a full audit to be undertaken; a full description of each item must be given, and serial numbers included where appropriate.
- 5.5. The University's standard terms provide for payment to be made 30 days from date of invoice. Valid invoices should only be issued after the University has provided of

a formal purchase order and will be processed for payment following receipt confirming delivery/acceptance of the goods/service.

6. Delivery

- 6.1. Time of delivery is of the essence of the contract. Bidders must state their earliest delivery/commissioning time-scales on all options offered. Proposal are requested to deliver all work packages within 3 months from the contract start date. Recommendations are also welcomed on additional/different work packages needed to fulfil this tender.

- 6.2. Payment milestones are outlined below:

Payment milestone 1, Month 1

Upon completion of Work Package 1: Recommended User Segmentation, the University will pay the amount for **Work Package 1** - Recommended User Segmentation, the University will pay all undisputed, correctly issued invoices, including any applicable VAT, within 30 days of receipt of the invoice.

Payment milestone 2, Month 3

Upon completion of the final project the University will pay the amount for **Work Package 2** – Operating Model, **Work Package 3** – Technology Landscape / Logical Model, **Work Package 4** – Roadmap to achieve TOM and Technology Landscape. The University will pay all undisputed, correctly issued invoices, including any applicable VAT, within 30 days of receipt of the invoice.

7. Terms and Conditions

Any contract arising from the bid will be subject to the University of Manchester Terms and Conditions attached alongside this tender. – **Please note due to the urgency of the services the University does not expect any further negotiations or amendments to the Terms and Conditions issued.** Suppliers should only propose alternative terms to terms that would prevent your organisation from being able to participate in the tender exercise.