Expansion proposal: weekly dashboards for five more stores, Bluefern Grocers

November 23, 2026

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Expansion proposal: weekly dashboards for five more stores, Bluefern Grocers

Prepared for: Bluefern Grocers

Prepared by: Larkfield Analytics Ltd

Proposal purpose: Expand the existing weekly dashboard service from three stores to five additional stores.

Commercial term: 12-month price, excluding VAT.

Proposal validity: 60 days from the date of issue.

Payment terms: Invoiced monthly in arrears, payable within 30 days.

Governing law: The law of England and Wales, with disputes referred to the courts of England and Wales.

> Bluefern Grocers, its existing dashboard service, Larkfield Analytics, all parties and every figure in this proposal are fictional. This expansion proposal is a worked example.

Executive Summary

We propose, subject to bid-team approval, technical validation and Bluefern Grocers approval, to extend the existing weekly dashboard approach from three current stores to five additional stores. The proposed expansion would connect the supplied till and stock feeds, configure dashboards for the new stores, provide manager access, deliver training and complete a staged handover.

The first new stores are due within 14 weeks. Our proposed implementation plan uses discovery, data-connection work, dashboard configuration, access testing, training and staged launch activities designed to fit within that period. The proposed 12-month full-scope price is **£75,300 excluding VAT**, which is within the stated **£76,000 ceiling**.

The proposed scope does not include loyalty data, customer-level profiling or survey fielding. We include no survey-analysis charge because the stated scope does not require survey work.

To be confirmed: bid-team authority to submit the proposed scope, staffing plan, delivery commitments and commercial offer.

Current State Success

Bluefern Grocers currently uses a weekly dashboard in three stores. This proposal preserves that reporting approach while distinguishing the existing three-store service from the proposed five-store addition.

Service area	Existing three-store service	Proposed five-store addition
Store coverage	Three existing stores using a weekly dashboard.	Five additional stores.
Reporting approach	Existing weekly dashboard approach.	Proposed configuration of the same reporting approach for newly added stores, subject to validation.
Data scope	To be confirmed: existing-store data feeds, data model and current dashboard configuration.	Buyer-supplied till and stock feeds for the five new stores.
Commercial coverage	Not included in this expansion price.	Included in the proposed 12-month expansion price.

We do not state measured sales results, customer outcomes or operational improvements for Bluefern Grocers. During discovery, we would propose agreed measures for evaluating dashboard availability, data completeness, manager access and adoption; those measures would require Bluefern Grocers approval.

Growth Opportunity

The opportunity is to apply the existing weekly dashboard model to five additional stores while maintaining a clear boundary between the current three-store service and the incremental five-store scope.

Subject to technical validation and approval, we would load the new till and stock sources into a reporting-store layout agreed during discovery. We would configure the additional store dashboards, provide named-user access for up to 40 named users, train managers and stage the handover of each new store.

Our proposed approach is designed around the following buyer requirements:

- Connect till and stock feeds for five new stores.
- Configure dashboards for those stores.

- Provide manager access and training.
- Deliver a staged handover.
- Make the first new stores live within 14 weeks.
- Provide a 12-month price including added platform capacity for up to 40 named users.

To be confirmed: the identities of the five stores, source-system owners, available export, database-view or API methods, data-field definitions, manager user list, nominated approver and kickoff date.

Expanded Solution

Proposed data and dashboard scope

Subject to confirmation of delivery capability, staffing and buyer approval, we propose to connect each new store through its available standard export or interface, using a scheduled file export, database view or API. Where a source system offers none, we propose to assess whether a read-only export can be built during discovery at no extra charge.

We would propose a common reporting-store layout for the additional till and stock feeds, documented in a data dictionary retained by Bluefern Grocers. The proposed dashboard configuration would present the agreed weekly reporting views for each additional store, using the same reporting approach as the existing service subject to discovery findings.

We propose daily dashboard refreshes where source availability supports that interval. The weekly dashboard reporting approach would remain the management reporting cadence. To be confirmed: source-feed refresh availability, data latency, reconciliation rules and final weekly dashboard measures.

Proposed access, security and assurance controls

Larkfield Analytics hosts client data in a UK data centre, encrypted at rest and in transit, with named-user access and a quarterly access review. Subject to technical validation and Bluefern Grocers approval, we propose to configure role-based access for named users, test each manager's access against their allocated store or stores, and retain evidence of user-acceptance testing.

Our dashboards are built to WCAG 2.2 level AA and tested against it before launch and at each major release. We record accessibility defects found in testing and fix them before a dashboard goes live.

We propose, subject to buyer approval, a backup-and-restore design covering the reporting store, dashboard configuration and access-control records. The proposed design

would assign Larkfield Analytics responsibility for performing the restore procedure and Bluefern Grocers responsibility for approving the restored data and access results. We would propose a recovery test before the first launch and record the result, restore duration and corrective actions.

To be confirmed: backup retention period, recovery-point objective, recovery-time objective, Bluefern Grocers security requirements and approval of the proposed backup-and-restore procedure.

Training, handover and support

Subject to staffing confirmation and buyer approval, we propose to provide two half-day in-person training sessions for service managers: one at launch and one at month six. We would also provide one 90-minute briefing for elected members each year and a recorded walkthrough of every dashboard. For this retail expansion, Bluefern Grocers should confirm whether the elected-member briefing is required or whether a comparable leadership audience should be agreed.

We propose a staged handover in which each store is demonstrated to the nominated approver, manager access is tested, the dashboard walkthrough is issued and acceptance is requested against criteria agreed during discovery.

As an unapproved support proposal for agreement, we propose support coverage on business days, 09:00 to 17:00 UK time, for the 12-month expansion term. We propose the following incident definitions and targets:

- **Priority 1:** all five additional-store dashboards unavailable or a confirmed personal-data security incident. Proposed acknowledgement within four business hours and updates every four business hours until stabilised.
- **Priority 2:** one store dashboard unavailable or a material refresh failure. Proposed acknowledgement within one business day and updates each business day.
- **Priority 3:** a non-critical dashboard defect, access request or enhancement request. Proposed acknowledgement within two business days and prioritisation through the next agreed delivery review.

The proposed escalation route is Engagement Director Imogen Farrow, followed by Larkfield Analytics' managing director. To be confirmed: support staffing availability, support contact channels, named operational contacts and approval of the proposed coverage hours, priorities and targets.

Additional Investment

The following concise pricing schedule covers only the proposed five-store addition. It excludes the existing three-store service and excludes VAT. The proposed effort allocation is a planning assumption requiring bid-team approval; the fixed rates are stated for the whole contract term, including any extension.

Proposed expansion line item	Rate-times-quantity	Amount excluding VAT
Engagement direction, governance, acceptance and staged handover	£1,150 per day × 5 days	£5,750
Data engineering for five-store till and stock connections	£950 per day × 35 days	£33,250
Dashboard development, configuration, access testing and training materials	£780 per day × 25 days	£19,500
Hosting and dashboard-platform licence for up to 40 named users	£1,400 per month × 12 months	£16,800
Full-scope total for five-store addition	**Proposed 12-month scope**	**£75,300**

The proposed full-scope total is below the stated £76,000 ceiling and within the buyer's stated budget range of £66,000 to £76,000, excluding VAT.

Survey analysis and survey fielding are not included because no loyalty data, customer-level profiling or survey fielding is in scope. No survey-analysis line item is required unless Bluefern Grocers changes the scope.

Expenses are not charged unless Bluefern Grocers agrees them in writing in advance. Agreed travel and out-of-pocket costs are charged at cost.

To be confirmed: VAT applicability and amount, approval of the proposed effort quantities, any required travel, any scope changes, and bid-team authorization of the £75,300 excluding-VAT commercial offer.

Implementation Plan

The following is a proposed kickoff-relative plan and planning assumption designed to meet the requirement that the first new stores are due within 14 weeks. A calendar schedule requires a confirmed kickoff date.

Proposed timing	Activity and deliverable	Responsible role	Predecessor or dependency	Observable acceptance criteria
Weeks 1-2	Discovery: stakeholder interviews, data inventory, proposed data dictionary, implementation plan and written data protection impact assessment.	Engagement Director and Lead Data Engineer	Kickoff, access to source-system owners and nominated approver.	Bluefern Grocers signs off the data protection impact assessment before personal data moves; discovery criteria are agreed in writing.
Weeks 3-6	Build and test till and stock-feed connections for the first proposed launch stores.	Lead Data Engineer	Approved source access, sample data and agreed field definitions.	Agreed data fields load into the reporting store and reconciliation results are reviewed against agreed rules.
Weeks 5-8	Configure first-store dashboards, named-user access and accessibility testing.	Dashboard Developer	Available reporting-store data and approved dashboard measures.	Dashboard views are demonstrated; named-user access is tested; WCAG 2.2 level AA testing records no unresolved pre-launch defects.
Weeks 9-10	First staged launch, manager training, recorded walkthrough and handover.	Engagement Director and Dashboard Developer	Completed testing and manager-user list.	First new stores are live within 14 weeks; nominated approver confirms acceptance or lists material issues for correction.
Weeks 11-14	Configure and hand over remaining new stores through staged launches.	Lead Data Engineer and Dashboard Developer	Source-feed readiness, store-manager availability and acceptance of prior launch learning.	Each remaining store is demonstrated, access-tested and submitted for written acceptance.
Post-launch through month 12	Proposed operational support, quarterly access reviews and month-six manager training.	Proposed support team and Engagement Director	Approved support model and named buyer contacts.	Support activity follows the agreed support model; access reviews and training are recorded.

Delivery would follow fortnightly sprints with a written progress report and a risk register reviewed at every steering meeting. Larkfield Analytics demonstrates each deliverable to Bluefern Grocers' nominated approver. Bluefern Grocers confirms acceptance in writing against criteria agreed during discovery, or lists the material issues to be corrected.

To be confirmed: kickoff date, store launch sequence, source-system access dates, nominated approver, steering-meeting attendees and approval of this planning schedule.

Combined Value

The proposed expansion would provide a single planned approach for the five additional stores while retaining the separation between the existing three-store service and the incremental scope funded through this proposal. The proposed combined operating model would use till and stock feeds, configured dashboards, named-user access, training and staged handover.

Our relevant illustrative experience is fictional and is provided only as a worked-example indication of methods previously described; it is not evidence of an outcome for Bluefern Grocers and does not establish or guarantee a sales, service or customer result.

- At fictional Hollin & Rye Stores, a regional retailer with eleven shops, the illustrative work connected till, stock and loyalty data and produced a weekly dashboard for each shop manager. The fictional case study reports stock-outs falling from an average of 14 per shop per month to 6 within four months. The loyalty-data element is not proposed for Bluefern Grocers.
- At fictional Wexcombe District Council, the illustrative work replaced four feedback forms with one survey and a weekly dashboard. The fictional case study reports response rates rising from 9 percent to 23 percent over 18 months. Survey work is not in scope for Bluefern Grocers.
- At fictional Tavistone Housing Association, the illustrative work redesigned an annual tenant survey and built a quarterly board dashboard. The fictional case study reports that the first quarterly dashboard reached the board six weeks after contract start. This does not represent a proposed Bluefern timetable.
- At fictional Ardmoor Borough Council, the illustrative work joined three complaints and compliments sources into one dashboard for 14 service managers. The fictional case study reports quarterly-report preparation reducing from 11 working days to 3. This is not a forecast for Bluefern Grocers.

To be confirmed: whether Bluefern Grocers wishes to contact any fictional illustrative references and whether the bid team is authorised to provide reference contact details.

Next Steps

To move toward acceptance, we ask Bluefern Grocers to confirm the following items for joint review:

1. Confirm the five additional stores, preferred launch sequence and kickoff date.
2. Confirm the till and stock source systems, available interface methods, data owners and access dates.
3. Confirm the required dashboard measures, existing three-store configuration elements to be retained and data-reconciliation criteria.
4. Confirm the manager user list, role design, named approver and acceptance process.
5. Confirm approval or required changes to the proposed support model, backup-and-restore procedure, recovery-test procedure and security requirements.
6. Confirm whether the elected-member briefing is required or identify the intended leadership audience.
7. Confirm VAT treatment, any agreed travel requirements and approval of the proposed £75,300 excluding-VAT full-scope price.

To be confirmed: legal effect of this proposal, warranty terms, submission authorization and final contract documentation.

Once Bluefern Grocers confirms the scope, dependencies and commercial approvals above, we can submit the proposed expansion for acceptance and plan kickoff for the five-store addition.