Website showcase — Arc Client Proposal & Questionnaire (Fenwick & Dale)

October 21, 2026

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Weekly Shop Dashboards Proposal for Fenwick & Dale Stores

Cover Page

Prepared for: Fenwick & Dale Stores

Prepared by: Larkfield Analytics Ltd

Proposal: Weekly dashboards for nine shops and a head-office comparison view

Year 1 investment: £56,220 excluding VAT

Delivery commitment: First dashboards in shop managers' hands within 14 weeks

Fenwick & Dale Stores and Larkfield Analytics Ltd are fictional, and this proposal is a worked showcase example.

Executive Summary

Fenwick & Dale Stores needs a practical, weekly view of sales, stock-outs and orders across nine shops. Today, shop managers order stock from separate spreadsheets, while head office receives sales totals only once a month. Till, stock and loyalty-card data sit in three separate systems that do not communicate with each other.

We will connect these systems into one reporting store and deliver browser-based dashboards: one weekly operational dashboard for each shop manager and one head-office view comparing all nine shops. The dashboards will provide a shared view of what sold, what ran out and what is on order, enabling managers and head office to identify the shops and product lines requiring attention.

The cost of inaction may be material. Fenwick & Dale Stores' finance team estimates that out-of-stock lines cost **5 to 7 percent of weekly sales in its three busiest shops**. This is the buyer's own untested estimate and has not been validated by Larkfield Analytics Ltd.

We will own the data connections to the till, stock and loyalty systems, reducing demand on your two-person IT team. We will complete discovery, build and test the reporting store and dashboards, train users, and place the first dashboards in shop managers' hands within 14 weeks.

The fixed Year 1 fee is **£56,220 excluding VAT**, including hosting and platform licence for up to 40 named users for 12 months. This is within your stated first-year budget of £45,000 to £65,000 excluding VAT, including hosting.

Understanding Your Needs

Problem Statement

Your nine shops need timely, consistent operational information to manage availability. Shop managers currently use their own spreadsheets to order stock, while head office sees sales totals only once a month. This creates a gap between shop-level decisions and head-office oversight.

You have identified that popular lines are out of stock too often, but head office cannot readily see which shops or product lines perform worst. Your till, stock and loyalty-card data are held in three separate systems that do not currently communicate with one another.

Your Required Outcomes

- A weekly dashboard for each shop manager showing what sold, what ran out and what is on order.
- One head-office dashboard comparing performance across all nine shops.
- Supplier-owned connections to till, stock and loyalty systems so that your two-person IT team does not have to own them.
- First dashboards in shop managers' hands before the spring season starts in 14 weeks.
- A solution supported by access to all three systems and a half-day each week from your head of retail operations.

Cost of Inaction

Your finance team estimates that out-of-stock lines cost 5 to 7 percent of weekly sales in your three busiest shops. This remains your own untested estimate. The proposed dashboards will give you the evidence needed to identify stock-out patterns and support more informed action.

Proposed Solution

Outcome-Focused Dashboard Service

We will provide a single reporting service that combines till, stock and loyalty-card data into a common reporting layout. Each source will load into one reporting store, supported by a data dictionary that you retain.

Shop managers will receive a weekly operational dashboard focused on sales, stock-outs and orders. Head office will receive a comparison view across the nine shops. The dashboards will be browser-based, use role-based access, and refresh daily.

Key Benefits

- **Earlier visibility:** shop managers and head office will work from a common, current view rather than separate spreadsheets and monthly sales totals.
- **Focused stock-out management:** dashboards will identify what ran out, helping you investigate the affected shops and lines.
- **Comparable performance:** the head-office view will support comparison of all nine shops.
- **Reduced IT burden:** we will own the connections to the till, stock and loyalty systems.
- **Controlled access:** the service uses named-user access, with a quarterly access review.

Data Connection and Reporting Approach

We will connect to each client system through its standard export or interface, using a scheduled file export, database view or API. Where a system offers none, we will build a read-only export during discovery at no extra charge.

We will agree the common data layout during discovery and document it in a data dictionary. We will collect and keep only the personal data required for the project's agreed purpose.

In addition to daily dashboard refreshes, our decision-dashboard service includes a monthly narrative summary written by an analyst and a quarterly review workshop. The quarterly written report will be delivered within 15 working days of each quarter end. Our Engagement Director will present it to your cabinet or board on request.

Implementation Approach

Scope by Phase

Phase	Scope	Deliverables
Discovery	Two-week discovery including stakeholder interviews, data inventory, dashboard requirements, common data layout and written data protection impact assessment.	Agreed requirements, data inventory, data dictionary approach, written data protection impact assessment for client sign-off before any personal data moves.
Data Connections and Reporting Store	Connect till, stock and loyalty-card systems using standard exports or interfaces; build a read-only export where no interface is available; load sources into one reporting store.	Supplier-owned data connections and consolidated reporting store.

Phase	Scope	Deliverables
Dashboard Build	Build weekly shop-manager dashboards and the head-office comparison view; configure role-based named-user access.	Nine shop dashboard views and one head-office comparison view.
Testing and Acceptance	Demonstrate deliverables, test accessibility, record and correct accessibility defects before go-live, and address material acceptance issues.	Demonstrated dashboards ready for written acceptance.
Launch and Adoption	Provide an in-person half-day training session at launch, a recorded walkthrough of every dashboard, and operational handover.	First dashboards in shop managers' hands within 14 weeks.
Year 1 Service	Daily refreshes, monthly narrative summary, quarterly review workshop, quarterly written report, quarterly access review, and a second in-person half-day training session at month six.	Ongoing reporting and user support through the first 12 months.

Delivery Governance

We will deliver through fortnightly sprints, supported by a written progress report and a risk register reviewed at every steering meeting. Your head of retail operations will provide the planned half-day each week, supporting timely decisions and access coordination.

Our named escalation route is Imogen Farrow, Engagement Director, followed by Larkfield's managing director.

Timeline & Milestones

Timing	Milestone	Outcome
Weeks 1-2	Discovery	Stakeholder interviews, data inventory, agreed requirements and client sign-off of the written data protection impact assessment before personal data moves.
Weeks 3-6	Data connection and reporting-store build	Till, stock and loyalty-card data connected and prepared in an agreed common layout.
Weeks 7-10	Dashboard development	Shop-manager dashboards and head-office comparison view configured for review.
Weeks 11-12	Testing and acceptance preparation	Accessibility testing, defect correction, deliverable demonstrations and acceptance review.
Weeks 13-14	Launch	Training, recorded walkthroughs and first dashboards in shop managers' hands within 14 weeks.
Month 6	Follow-up training	Second in-person half-day training session for service managers.

Investment

The Year 1 fee is fixed at **£56,220 excluding VAT**. It includes delivery, supplier-owned data connections, hosting and platform licence for up to 40 named users for 12 months.

Role / Item	Quantity	Unit Rate	Line Total
Engagement Director - Imogen Farrow	6 days	£1,150/day	£6,900
Lead Data Engineer - Dev Okonkwo	16 days	£950/day	£15,200
Dashboard Developer - Tomasz Wren	18 days	£780/day	£14,040
Senior Survey Analyst - Sunniva Hale	4 days	£820/day	£3,280
Hosting & platform licence for up to 40 named users	12 months	£1,400/month	£16,800
Total Year 1 Fee			**£56,220 excluding VAT**

This investment falls within Fenwick & Dale Stores' first-year budget of £45,000-£65,000 excluding VAT.

We will invoice monthly in arrears. Payment is due within 30 days. Rates are fixed for the whole term of a contract, including any extension.

No expenses will be charged unless you agree them in writing in advance. Agreed travel and out-of-pocket costs will be charged at cost.

Why Choose Us

Larkfield Analytics Ltd is a data and survey analytics consultancy founded in 2014 and based in Larkfield. We have 31 staff across Survey Design, Data Engineering and Decision Dashboards, and work mainly for local authorities, housing associations and regional retailers.

- We connect point-of-sale systems, case-management systems and contact-centre systems into reporting stores with automated daily refresh.
- We build browser-based decision dashboards with role-based access, monthly narrative summaries and quarterly review workshops.
- We are a registered data controller and processor.
- We hold the Clearfield Data Practice assurance mark, renewed in March 2026.
- We hold £5 million public liability insurance and £2 million professional indemnity insurance, both renewed each January.
- We have never been the subject of a contract termination for default.
- We disclose no conflicts of interest with Fenwick & Dale Stores.

Our delivery method combines technical ownership with active governance. We use fortnightly sprints, written progress reporting, steering-meeting risk reviews and a named escalation route.

Case Studies

Hollin & Rye Stores

For Hollin & Rye Stores, a regional retailer with eleven shops, we connected till, stock and loyalty data and produced a weekly dashboard for each shop manager in 2025. Stock-outs reported by shop managers fell from an average of 14 per shop per month to 6 within 4 months. The contract value was £58,000.

Reference: Perrin Hale, Operations Manager, perrin.hale@hollinrye.example, 01000 555 0104.

Ardmoor Borough Council

For Ardmoor Borough Council, we joined three complaints and compliments data sources into one dashboard for 14 service managers from 2023 to 2024. The median time to produce the quarterly complaints report fell from 11 working days to 3. The contract value was £148,000, and the work was delivered on time.

Reference: Elspeth Rowan, Head of Corporate Performance, elspeth.rowan@ardmoor-council.example, 01000 555 0102.

Wexcombe District Council

For Wexcombe District Council, we replaced four separate feedback forms with one survey and a weekly dashboard between 2023 and 2025. Response rate rose from 9 percent to 23 percent over 18 months. The contract value was £212,000; we delivered on time and 3 percent under budget.

Reference: Corin Aldous, Head of Customer Services, corin.aldous@wexcombe-council.example, 01000 555 0101.

Tavistone Housing Association

For Tavistone Housing Association in 2024, we redesigned the annual tenant survey around the regulator's required measures and built a quarterly dashboard for the board. The first quarterly dashboard reached the board 6 weeks after contract start. The contract value was £96,500.

Reference: Maren Ostby, Director of Operations, maren.ostby@tavistone-housing.example, 01000 555 0103.

Team

Team Member	Role	Relevant Responsibility
Imogen Farrow	Engagement Director	Has 16 years in public-sector research, leads every contract and signs off every report.
Dev Okonkwo	Lead Data Engineer	Has 11 years building reporting stores and owns data protection impact assessments for Larkfield projects.
Tomasz Wren	Dashboard Developer	Has 7 years building dashboards and owns accessibility testing against WCAG 2.2 level AA.
Sunniva Hale	Senior Survey Analyst	Has 9 years designing resident and tenant surveys, holds a postgraduate diploma in survey methodology, and writes the narrative summary in every monthly and quarterly report.

Terms & Conditions

Service Assurance

- We host client data in a UK data centre.
- We encrypt client data at rest and in transit.
- We use named-user access and conduct a quarterly access review.
- We will notify Fenwick & Dale Stores of a confirmed personal-data breach within 24 hours of confirming it. The notice will state what happened, which data is affected and what we are doing about it at that time.
- We build dashboards to WCAG 2.2 level AA and test against this standard before launch and at each major release.
- We record every accessibility defect found in testing and fix it before the dashboard goes live.

Acceptance

We will demonstrate each deliverable to your nominated approver. You will confirm acceptance in writing against the criteria agreed in discovery, or list the material issues we must correct. We will correct the listed material issues and re-present the affected deliverable for acceptance.

Compliance Matrix

Requirement	Our Response	Status
Weekly dashboard for each of nine shop managers showing what sold, what ran out and what is on order.	We will provide weekly operational dashboards for the nine shops covering sales, stock-outs and orders.	Compliant
One head-office view comparing the nine shops.	We will provide one head-office comparison dashboard across all nine shops.	Compliant
Supplier ownership of till, stock and loyalty-system connections.	We will own the data connections and connect the three systems into one reporting store.	Compliant
First dashboards in shop managers' hands within 14 weeks.	We will deliver the first dashboards within 14 weeks.	Compliant
Hosting within the first-year budget of £45,000-£65,000 excluding VAT.	The Year 1 fee, including hosting and platform licence for up to 40 named users for 12 months, is £56,220 excluding VAT.	Compliant
Jurisdiction in which client reporting data is hosted, and encryption in transit and at rest.	We host client data in a UK data centre and encrypt it at rest and in transit.	Compliant
Maximum timeframe to notify Fenwick & Dale Stores of a confirmed personal-data breach.	We will notify you within 24 hours of confirming a personal-data breach.	Compliant
Accessibility standard met before go-live and ownership of testing.	Dashboards are built and tested to WCAG 2.2 level AA before launch. Tomasz Wren owns accessibility testing.	Compliant
Air-gapped on-premises hardware server inside each of the nine shop back-offices.	To be confirmed: air-gapped on-premises hardware server inside each of the nine shop back-offices.	To be confirmed
24/7/365 telephone helpdesk coverage on Christmas Day and UK bank holidays.	To be confirmed: 24/7/365 telephone helpdesk coverage on Christmas Day and UK bank holidays.	To be confirmed

Commercial and Legal Terms

- Our proposals are valid for 60 days from the date of issue.
- We invoice monthly in arrears, payable within 30 days.
- Rates are fixed for the whole term of a contract, including any extension.
- Governing law is the law of England and Wales, with disputes referred to the courts of England and Wales.
- We accept the buyer's standard terms and conditions and list no clarifications.
- We declare that we have not colluded with any other bidder and offer no gift or inducement to any officer of the buyer.

- We hold a current tax clearance certificate and will make our modern slavery statement available on request.

Next Steps

1. Confirm that you wish to proceed with the proposed Year 1 scope and investment of £56,220 excluding VAT.
2. Nominate your approver, project contacts and the head of retail operations for weekly engagement.
3. Provide access to the till, stock and loyalty-card systems.
4. Agree the discovery start date so that we can place the first dashboards in shop managers' hands within 14 weeks.
5. Provide written acceptance of this proposal within its 60-day validity period.

Conclusion

This proposal gives Fenwick & Dale Stores a defined route from disconnected till, stock and loyalty-card systems to daily refreshed, browser-based operational dashboards for nine shops and a head-office comparison view.

Please confirm your acceptance of the £56,220 excluding VAT Year 1 proposal and nominate your project contacts so that we can begin discovery and deliver the first dashboards within 14 weeks.