

Engagement Process

Timescales for the process

Providing exact timings can be difficult but the table below gives an indicative guide.

Please note that different factors can affect each project, including issues such as the complexity, trust internal discussions, the number of stakeholders we need to engage with, supplier engagement and the availability of key individuals.

Projects may also simply include migration across to the framework or extend to complex market assessment projects conducted over several weeks.

Timeline	Steps	Detail	Any Considerations
Week 1-3	Identify and profile the customer		
	Initial contact with trust group	NHS Supply Chain Account Manager must be included to begin proceedings and facilitate a meeting. Relevant trust information is gathered in readiness for the meeting	
	Advise NHS Supply Chain Account Manager – engagement throughout process		
	Internal records opened within NHS Supply Chain and maintained throughout the process		
	Systems implementation informed	Trust ability to place orders via eDirect confirmed. Any issues to be discussed with NHS Supply Chain Account Manager	
	Onsite meeting arranged	Assigned CM and CEIM attend a meeting at the trust to discuss the full scale of the intended project and full service outlined	
	Meet procurement and business leads, discuss process and scope project		
	Assessment of compliance, contractual obligations, stock barriers, local culture, clinical barriers	Trust to discuss contractual position and barriers across areas of spend Agreement to progress secured	

Timeline	Steps	Detail	Any Considerations
Week 4-5	Initial Benchmarking		
	Obtain usage, analyse 12 month practice with all suppliers	Trust sends a list of all suppliers in scope to NHS Supply Chain and also gives authorisation through a consent form to obtain up to date 12 months usage directly from suppliers	Suppliers are given one week to return data in the correct format, via a template from NHS Supply Chain
	Follow up retrieval of data from suppliers, sense check and amalgamate completeness		Trust should run an internal report against the same suppliers to give an indication of the expected total spend
	Data benchmarked by Data Analysis team	Timelines agreed for completion of benchmarking and the production of the SER	Any suppliers who may cause delay will be referred to the trust
	Sense checked data output from Data Analysis		The SER will categorise all expenditure and will form the basis of all activity from that point on
	Finalise SER - Financial overview of practice submitted as SER categorising all spend into distinct subspecialties	Meeting arranged to discuss the process in more detail and the overall trust position with all affected stakeholders. Clinical lead notified and the meeting is arranged when availability suits	Analysis will be at line level and compare current expenditure against appropriate banded prices on the framework
	Meet procurement and clinical leads, work through SER to develop work plan based on outcomes	Recommended work plan discussed with the trust to highlight priority areas of work and to take note of potential quick wins	Once data is collated and passed to the data team, it will take two weeks to produce the final analysis and SER Should suppliers return sales data with items not included on the framework, they will need to be added to the framework in order to complete this work (this may cause additional delays)

Timeline	Steps	Detail	Any Considerations
(Subject to clinician availability)	Clinical engagement		
Week 6-12	Presentation to consultant group, theatre, finance and procurement leads to give overview, explain full process. Clinical focus and outcome centred, initial concerns discussed	CM and CEIM present to trust stakeholders and outline the national strategy, give a briefing on the findings to date. Trust SER is discussed in detail and an interactive, clinically focused session is utilised to review quick wins, commitment options and potential work plan projects across each subspecialty. Recommendations are offered and discussed and NHS Supply Chain gives an outline of experience in projects across the country and the processes for consolidation, if required. Individual meetings with clinical stakeholders to discuss the detail of the spend area are arranged	Access forms are signed by procurement for migration to the framework without commitment. Any commitment to current practice requires a clinical signatory Trust in readiness to transact via eDirect is confirmed Suppliers notified and catalogues shared. Clinical lead for each subspecialty project within the agreed work plan is confirmed and direct engagement with relevant CEIM begins
	SER presented to understand full spend intelligence across the department		
	Immediate sign up options based on status quo opportunities and work plan options detailed for sub-specialty projects		
	Quick wins - access forms drawn up and signed by any relevant party		
	Transfer trust to NHS Supply Chain agreement; quick wins on status quo supply - implement catalogue		
	Saving delivery, status quo opportunities implemented, catalogues updated, suppliers notified		
	Work plan developed for agreed projects. (Possible end of project, moving straight to implementation and contract management depending on trust requirements)		
	Arrange group or individual surgeon meetings should there be any issues or concerns		
	Produce report to evidence potential opportunities and feedback from consultant meeting; if required		
	Single or various workplans - process commences on market assessment/standardisation		
	Work plan leads from affected departments assigned at trust		
	Clinical lead assigned at trust based on the sub-specialty project		
	Priority projects agreed and order set		

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Week 6-12	Supplier day organised (if needed)	<p>NHS Supply Chain has various proven formats for supplier days, depending on the area of spend</p> <p>These events are recommended for clinical teams to review products and services from across the market ahead of making longer term decisions</p> <p>Should one be required, communications will be agreed and communicated via NHS Supply Chain</p>	<p>Clinicians may need between six and eight weeks' notice to attend supplier days</p> <p>Format, locations, dates and logistical arrangements are determined</p>
	<p>Templated procedure based analysis to begin - key stage to enable an informed award and process dependant on subspecialty project - between 15 and 60 hours to develop templates</p> <p>Regular engagement with clinical and procurement lead is required</p>	<p>CEIM to engage on a continual basis with nominated clinical lead in developing the templates to ensure that the true current position and objectives and ambitions for the short, medium and long term are factored into the work</p>	<p>CEIMs work around clinician availability and so direct contact is required for the term of the project</p> <p>Potential barriers highlighted at the start of the process are confirmed and service based requirements which are important to the department are discussed</p>
	Detailed Options Analysis	A crucial phase which will take into account any required changes in clinical practice and the requirements of consultant support staff, such as theatres, stores and procurement	
	<p>Component level characterisation and selection of comparable products - common components, implants, procedures</p> <p>Templates populated by CEIM - shared with lead clinicians and accurate baseline agreed. Evidence and implant characteristics considered</p>	<p>Finalised document agreed by clinical lead as a true representation of the current practice and future requirements</p>	
	<p>Templates populated with alternative product and supplier options and sent to suppliers to populate</p>	<p>Certain templates will be required to send to suppliers to request their alternatives. This is to give suppliers ownership and a focussed return which is catered to the requirements of the clinical team in question</p> <p>The prices included will be subject to those within the commercial structure of the framework agreement</p> <p>Suppliers are able to offer more competitive pricing but in doing so must amend the framework commercial discounts / options before it can be made available to any individual / group of NHS trust(s)</p>	<p>Important that trust procurement leads on market assessment project are aware of the end to end process and commercial parameters of the framework to enable a joined up discussion with suppliers</p>

Timeline	Steps	Detail	Any Considerations
Week 10-12	Financial impact report produced - identifying options for further consideration; rationalised supply base/alternative supply options	Working closely with the lead clinician, our CEIM will model the returns into several options centred around the portfolios and ability of suppliers in scope to cater for the needs of the department. Gaps are filled in to ensure all procedural requirements are met and the master data set is produced ahead of the supplier day	It is imperative the right stakeholders are involved in the process to ensure an effective implementation of the subsequent contract and also to ensure an effectively adhered to contract for the lifetime of the agreement
	Supplier day confirmed, and structure finalised and communicated		
	Clinician meeting alongside supplier day to consider options - including split business and market share, clinician specific allowances, component realignment	At the supplier event, (in which the format has been determined and communicated earlier in the process), suppliers are tasked with demonstrating their offerings from a product and support perspective	Departments must collectively understand what is important to them in selecting a supplier to work in partnership over the coming three to four years, which will improve the efficiency of the department and allow for improvements in the patient journey and outcomes
	Options - scenarios ascertained and data rerun, analysed and subsequent report delivered to key personnel	Initial commercial findings based on initial analysis will be discussed amongst the project group at the start of the meeting and as such, the supplier sessions can focus purely on clinical interests	Initial financial assessment will yield multiple saving options which will be loaded onto NHS Supply Chain internal records
	CM and CEIM present scenario analysis followed by clinical meeting to determine outcome/options	It is recommended that each affected consultant attends each suppliers' session and that at least one senior representative from orthopaedic theatres and sterile services also attends the day Throughout and at the end of the supplier event, discussions will focus on products and service confidence. Consultants will opt for several focussed options in product mix which will form the basis of further iterations of analysis to be conducted by the CEIM in close contact with the lead clinician	

Timeline	Steps	Detail	Any Considerations
Week 13-14	Clinical trials and workshops if required Suppliers organised and pricing arranged for trial	In order to gain more confidence in certain products and the service provided by suppliers, clinicians may look to conduct clinical dry bone workshops in which they are able to handle instruments and implants and discuss product platforms in more detail Consultants may also request a clinical trial in line with trust policy	Should clinical trials be required, the prices paid for products will be in line with the framework agreement and particularly equal to the prices that the trust would pay, should they progress to award the business to said supplier Trials must be time bound and suppliers must submit line level reports on all utilised products to NHS Supply Chain Products utilised in trials must be provided loan and hire free by the supplier
	Trust decision made - clinically led and approved by department, finance and procurement	Final product and supplier mix options are agreed and the trust has followed internal sign off processes. Consignment or stock levels determined ahead of supplier face to face debrief meetings. Suppliers invited to debrief meetings at the trust NHS Supply Chain issue access forms for relevant signatures ahead of this meeting	Internal records updated with finalised and agreed saving figure, NHS Supply Chain Account Manager updated on intended award NHS Supply Chain utilise escalation process with Supply Chain Coordination Ltd (SCCL) should there be any delays at the trust in coming to a final decision
	Award (meetings with suppliers dependant on level of business / subspeciality / sub lot of products)	NHS Supply Chain CM / CEIM chair supplier debrief meetings in which each affected supplier is invited to a half hour face to face meeting at the trust Trust clinical lead is invited but not essential for this meeting. Trust procurement lead must attend and it is advisable that the theatre lead for the subspeciality is also present for these meetings	Ahead of the meeting, information will need to be available or highlighted for discussion with each supplier: The award decision Products selected Stock and associated equipment requirement Implementation plan to be requested in relation to training and support in the run up to the live date, over the first three months and six months; and named contacts for account management and ongoing support Dates agreed - timelines for incoming and outgoing suppliers must be strictly adhered to Contact details for lead trust personnel given to suppliers to engage with over this period - recommended procurement lead (as overall project lead for changeover), theatre lead, stores lead and sterile services' lead

Timeline	Steps	Detail	Any Considerations
Week 15-16	Suppliers notified - SLAs drafted, access and commitment forms signed and shared with suppliers	Formal notification to suppliers sent in the form of the commitment based access agreement	Trust is encouraged to develop a Service Level Agreement (SLA) with the supplier. Commitments are in place as per the terms of the framework agreement and subject to each party adhering to their contractual obligations Supplementary service requirements which are specific to the trust needs must be highlighted and recorded. Failure to adhere to these service requirements may result in early termination of the agreement
	Implementation		
	Systems implementation	Outgoing suppliers notified of new banded prices to be in place by live date	
	Catalogue management		
	Supplier implementation plans (entering and exiting)	Implementation plans in place and mobilised	
	Training organised and agreed.		
	Stock management including instrument, implant consignment, storage	NHS Supply Chain update all catalogues for incoming and outgoing suppliers	
	Commitment forms signed		
	SLAs signed		
Continuous	Contract Management		
	Overseeing implementation	Contract management facilitated by the trust procurement lead with the assigned CM from NHS Supply Chain as requested	NHS Supply Chain is available to support suppliers and NHS trusts throughout the contract term Subsequent projects may run consecutively but consideration should be given to the level of change and potential disruption to the department across all affected stakeholders Work plans should be effectively managed to ensure this is limited and responsible in relation to the interests of the department and patients
	MI data collection		
	Review meetings		
	Issues resolved	Supplier MI data collected on monthly basis to ensure compliance	