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{Insert Your Logo Above}

*Request for Proposal Template*

*Microsoft Office 365 Migration*

Issued Date:

Submission Date: {Date} at {Time} EST

RFP Coordinator:

{Contact Info}

{Name}

{Include Company}

{Phone}

{Address}

{Email}

{Website}

Why Are We Providing this Template?

We have gathered years of experience in receiving and successfully answering IT requests for proposals. We strongly believe they are great tools for companies to find the best IT services and competitive prices. They are also a fantastic evaluation method for finding that elusive “best fit”.

However, the RFP process is often run by people who have never written or experienced an RFP to select and outsourced IT service provider. This leaves them with getting too few bids or bids that waste their time.  Our goal with the template below is to give you the basic questions to ask and measurements to think about to create your own technology RFP, and more importantly, reduce the friction I the RFP process whiling gaining an outsourced IT partner that can truly help drive your business.

This template (which is easy-to-use and ready to edit) is completely free to use with no obligations and no string attached. However as you will have noticed from this website, we are an IT managed services firm, with significant experience in Office 365 migrations.  Should you be interested in discussing what needs drove you into looking for and IT RFP template that focuses on Office 365 we would be more than happy to discuss them with you.  Simply [contact us](http://www.quartetservice.com/contact-us/) or call us at 416-483-8332.

1. PURPOSE

1. {Company Name} is seeking proposals from qualified vendors (Microsoft Partners eligible for FastTrack Deployment desired) to provide Microsoft Office 365 system integration and implementation services. The scope of the project will be migrating {Company Name} from a {Current environment} to an Office 365 hosted email service.

2. The awarded vendor will assist {Company Name} in performing a readiness assessment of the existing infrastructure including gather and document requirements, developing a migration plan and executing against this plan. Vendor will provide services needed to migrate approximately { Number of mailboxes being converted} mailboxes to Exchange Online with email archiving, eDiscovery, anti-malware and anti-spam filtering capabilities. The goal is to provide a seamless transition to Microsoft Office 365 Cloud architecture while maintaining secure and robust access to and from cloud services.

2. BACKGROUND

**Corporate Profile**

{Insert}

* Who you are and what you do
* How change resistant are your staff- how much training will they need?
* How familiar are your staff to an Exchange environment?
* Who is in charge of the environment
* How many users
* Is it a PC or MAC environment
* What is the server situation
* Where are those servers located
* What is the network situation
* What is the backup process
* Is there any applications running off your current systems that need to come over to Office 365
* How current is the hardware and software
* Who is currently providing technical support and guidance
* Are there any ad hoc solutions that have been implemented that a vendor should be aware of?

3. SCOPE OF WORK

**The Scope of Work will include:**

A detailed technical document and solution plan, which will provide a throrough and clearly-defined plan for a seamless migration to Office 365 including a significant focus on the communication and training requirements.

**Office 365 Readiness Assessment, Onsite Discovery, and Planning**

* Onsite review of client systems to gather and capture information about existing infrastructure
* Identify potential challenges in this migration and pose solutions
* Recommend a solid communications and training plan for {Company name} users based on best practices such as; lunch and learns, web based training and on desk materials.
* Networking and Naming Services Planning
* Determine required tasks for configuring network and DNS
* User Identity and Account Provisioning Planning
* Planning considerations to implement directory synchronization
* Plan for Active Directory Federation Services for use with single sign-on
* Exchange Online Planning
* Develop migration strategy
* Identify mailbox size and item counts that will be migrated to Office 365
* Determine mail-enabled applications and plan for configuration
* Conduct bandwidth assessment to calculate migration velocity for mailbox data

**Preparing Environment for an Office 365 Deployment**

* Implement enterprise wide training with employees through at least three forms of communication
* Prepare end user documentation on Outlook and the new Office 365 environment
* Assist with Domain Verification and Office 365 Registration
* Add and verify {Company’s name} domain name with Office 365
* Create DNS records to configure {Companies name} domain name for use with Office 365 services
* Configure on-premises AD for directory synchronization
* Deploy and configure Active Directory Federation Services to enable single sign-on
* Exchange Online Service Configuration
* Configure email coexistence with existing server and Exchange Online
* Mailbox quotas and archival/retention policies
* Anti-spam and malware protection
* Configure client computers and end-user experience

**Migration and Cutover**

* Assign licenses to users
* Migrate and synchronize mailbox data to Exchange Online
* Update DNS to point to Office 365
* Configure Outlook Web Access and Exchange ActiveSync for mobile phones and devices where applicable
* Perform Post-migration Service Testing of Office 365 functionality

**Post Deployment Support and Office 365 Administration Training**

* Have resources on-site and able to augment {Company name} support staff on the week after the migration is completed
* Onsite or Webinar Training with IT Staff
* Administering Office 365 Services
* Office 365 Admin Best Practices
* Managing DirSync
* Administering Microsoft System Center
* {X} Days of Post Deployment Support
* {X} Hours of Service Desk Support to be used within a 1 Year Term

**{Company’s name} environment is as follows and accurate as of {Date of info}:**

* Total storage (TB): **{XXXX}**
* Total storage of Archive (TB): **{XXXX}**
* Total licenses (mailboxes) in use: **{XXX}**
* Total amount of Mobile users: **{XXX}**
* Types of mobile devices: **{include make and models}**
* {The type of windows environment you have}
* Location of employee’s:
	+ {X} at head office
	+ {X} at brand offices (Name the locations of the various branches)
	+ {X} working remotely
		- The remote workers internet speed
* {The mix of laptops vs. desktops}
* {#of meeting rooms} to be used as resource boxes
* Approx.{X} email groups

PROPONENT AND SUBMISSION REQUIREMENTS

4.1. MANDATORY REQUIREMENTS

* The vendor will provide and execute the Office 365 migration plan
* All archive and mobile users and data will have to be included in this migration
* The migration will have to be seamless to the business, with a cutover happening on a designated weekend
* Office 365 will have to be in full production by **{Go live date}**
* The vendor will be responsible to setup any licensing required for this implementation
* The vendor will require a thoughtful and detailed plan around communication and training
* The vendor will provide detailed end user documentation, with screen shots and easy to read instructions, covering how to use Outlook and Office 365, lunch and learns, and web-based training.

4.2. OTHER REQUIREMENTS

* **Overview of firm**: a brief outline of Proponent’s experience along with pertinent corporate details including full legal company name; year business was established; and number of people currently employed.
* **Project and Client Management:** a detailed description of the approach and methodology for managing projects and client relationships.
* **Project Management Team**: a detailed description of the firm’s project management team including skills, experience and capabilities of relevant staff.
* **Project Schedule**: a detailed breakdown of all deliverables identified in the Scope of Work including, methods, tools and timeline to complete the project.
* **Client Reference List**: provide a client list for similar projects completed in the last three years for three different clients.
* **Project Costs:** The Proponent shall provide the total fixed price for the project based on the Scope of Work

**Any Proponent who submits a proposal will only do so if they meet the following criteria:**

* A duly authorized signing officer of the firm has signed and dated a letter by which they are agreeing to be bound by the proposal and the terms, conditions and description of services
* A declaration that the Proponent has not given, directly or indirectly, a benefit of any kind to anyone employed by, or otherwise connected with, {Company name} for the purpose of receiving favorable treatment
* A declaration that Proponent is compliant with the Ontarians with Disabilities Act.
* A tax compliance declaration that the vendor’s Ontario taxes are or will be in good standing prior to signing an Agreement.

5. TIMELINES

|  |  |
| --- | --- |
|  **Activity**  | **Date and Time**  |
| Issue Date of RFP  | {Date}  |
| Proponents Deadline for Questions  | {Date} |
| Deadline for Issuing Addenda  | {Date} |
| Proposal Submission Deadline  | {Date} |
| Evaluation of Proposals  | {Date} |
| Contract Award  | {Date} |

6. PROPOSAL EVALUATION PROCEDURE

6.1. It must be understood and accepted by any Proponent submitting a proposal that all decisions as to the degree to which a proposal meets the requirements of the RFP are solely within the judgment of the proposed evaluation committee.

6.2. Proponents must respond to this solicitation by submitting all data required herein in order for the proposal to be evaluated and considered for award. Failure to submit such data shall be sufficient cause for disqualification or a proposal from further consideration of award.

6.3. Proposal shall undergo a three-stage evaluation process:

**Stage I**

Stage I will consist of a review to determine which proposals comply with all the mandatory requirements.

**Stage II**

Stage II will consist of a scoring by {Company name} of each qualified Proposal on the basis of the Rated Criteria.

**Stage III**

Stage III will consist of a scoring of the pricing submitted by Proponents, the evaluation of price/cost shall be undertaken after the evaluation of mandatory requirements and any rated requirements has been completed.

**Cumulative Scores**

At the conclusion of Stage III, all scores from Stage II and Stage III will be added and, subject to satisfactory reference checks, and the express and implied rights of {Company name}, the highest scoring proponents will be selected for the interview stage.

7. PROPOSAL CONTENT & CRITERIA

7.1. EVALUATION CRITERIA

The following is an overview of the criteria and weightings of the rated criteria of the RFP.

|  |  |
| --- | --- |
| CRITERIA  | MAX SCORE  |
| A comprehensive O365 migration project plan with technical details on how the vendor will migrate current contents seamlessly to an O365 environment  | **20**  |
| A comprehensive communication, documentation and training section in the overall project plan  | **20**  |
| Capability to meet project timelines  | **20**  |
| Product and service history  | **5**  |
| Pricing  | **35**  |
| TOTAL  | **100**  |

8. PROPOSAL SUBMISSION INSTRUCTIONS

8.1. Sealed proposals are to be addressed and delivered to:

{Company Name}

{Address line 1}

{Address line 2}

{Recipient name and title}

8.2. Proponent must submit (#) original Proposal signed by an authorized representative and one (1) electronic copy on CD-ROM or USB Drive in a sealed envelope

8.3. Proposals submitted by facsimile or email will not be considered.

8.4. Late submissions will be disqualified and returned unopened.

8.5. {Company name} will not be responsible for any costs incurred in the preparation of the Proponent's submission. Once received the submission becomes the property of {Company name}

9. INQUIRIES

9.1 All questions and any form of communications with {Company name} regarding this RFP **must** be in writing and only be directed to the RFP Contact named on the cover page of this RFP unless otherwise advised in writing from the RFP Contact. Verbal responses to enquiries are not binding on any party.

10. INVESTIGATION OF REQUIREMENTS

10.1. The submission of a proposal for the provision of this service will be considered a representation that the Proponent has carefully investigated all conditions which may affect the delivery of the services outlined in this proposal and that the Proponent is fully informed as to the conditions which may be encountered and the volume and the quantity of the work to be performed

11. ACCEPTANCE, AWARD AND REJECTION

11.1. {Company name} reserves the right to terminate the process without awarding the contract.

11.2.{Company name} reserves the right to accept or reject any part, or all, of each proposal submission and/or not to make an award if none of the proposals received meet the requirements.

11.3. {Company name} may negotiate minor adjustments with the selected proponent prior to the final award of the contract.

11.4. The awarding of the contract is subject to the availability of funds for this statement of work. Should all proposals received exceed the specific budgeted funds and the highest ranked Proponent’s costs are within {Company’s name} total current year budget, we reserves the right to negotiate with the highest ranked Proponent.

11.5. {Company name} will not be responsible in law or in equity to any proponent for any claim for losses or damages, or any other relief, arising out of the RFP process including the selection or rejection of any particular section of this proposal.

11.6. {Company’s name} interpretation of the contents of the official proposal documents shall prevail.

12. AWARD AND EXECUTION OF CONTRACT

{Company name} will provide written notice to the successful Proponent, to advise that the proposal has been accepted.

The successful firm shall be required to enter into a contract with {Company}.

13. CONFIDENTIALITY

The Proponent shall treat and maintain as confidential any and all information provided by {Company name} in connection with the RFP.

14. CONFLICT OF INTEREST

The Proponent shall disclose in its proposal if (any anytime thereafter that it becomes aware that) any person who is an employee, officer, or director of {Company name} or any person at non-arm’s length from such person (as that term is defined in the *Income Tax Act*, Canada) is or becomes an employee, officer, director, partner, controlling shareholder, Broker or advisor of the Broker. {Company name} reserves the right to deem any such situation a conflict of interest and sufficient grounds to preclude awarding the contract to that Proponent

15. BANKRUPTCY INSOLVENCY OR CHANGE IN CONTROL

Proponent shall notify {Company name} if the proponent becomes bankrupt, insolvent or undergoes a change in control after submission of its proposal but before the awarding of the contract, which event shall constitute sufficient grounds for {Company name} to not award the contract to that Proponent.