

{Insert Your Logo Above}

Request for Proposal Template

Server Virtualization Services

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?

Based on the years of experience we’ve gathered in receiving and successfully answering IT Requests for Proposals (RFPs) we strongly believe they are not only a great a tool for companies to find the best IT services at competitive prices, but also a fantastic evaluation method for finding that elusive "best fit".

However, very often the RFP process is run by people who have never written or experienced a 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 that you might need to create your own technology RFP. And more importantly run the RFP process without too much frustration and with the end result of 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 a Toronto based IT managed services firm.  Should you be interested in discussing what needs drove you into looking for and IT RFP template 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.

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# **Request for Proposal (RFP)**

The {Company Name} invites you to respond to this Request for Proposal (RFP). The focus of the RFP is to select a single organization to provide server virtualization services, including planning, implementation and support, to {Company name} over a {# of years} period, beginning on {Date} and ending no later than {Date}. Following the initial term, there is a possibility to renew this contract for multiple {# of year} terms.

# **Introduction to {Company Name}**

* Industry
* Products/Services Offered
* Sector
* Geographic region and satellite offices
* Major drivers of server virtualization
* How many users
* Expected Growth
* Objectives of the users who will use the system
* What main goals you plan to achieve with this system

# **Overview of Current {Company Name} Technical Environment**

{Insert}

* 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
* 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?
* What applications do you use, who is it used by, what functions does it serve, is it hosted/local/COTS and when are the applications available to be used (24x7 or 8x5)
* What is your technical standards reference model? How would you break down your system into application layer, data layer, security layer and infrastructure?
* What software are you running to manage your servers (vendor and version)
* What year was your solution implemented?
* What is your server availability (24x7 or 8x5)
* What are the major functions of your server solution?
* The system interfaces with [x] technology to locations with limited bandwidth
* What’s the customization of your current system?
* Our CPU utilization averages to…
* The [company name] technical staff is responsible for what duties?

# **Service Requirements**

As part of this RFP, the following services are the current priority items for {Company Name}:

{Examples listed below}

* ***Scalability*** – {Company name} wants to virtualize at least half of the servers. We want to ensure your solution will be effective for the management and support of our servers.
* ***Power Management*** – We want to reduce our power usage. VMs should be consolidated into as few hosts as possible. Please explain how this would be configured.
* ***Application Awareness*** We use {Microsoft Exchange 2010, Microsoft Sharepoint 2007 and Microsoft SQL Server 2008 SP1}. Please explain how your proposed solution with manage the I/O requirements for these applications.
* ***High Availability*** – Please explain how your solution will allow our critical applications to run 24x7, how VMs will be priorities and how we can restart the VM without a loss of {#} pings.
* ***VM Management*** – Describe the capabilities of the proposed solution in terms of VM creation and templating, physical to virtual transitioning, and provisioning of VMs across multiple physical servers.
* ***Live* Migration** *–* We must be able to move a VM from one host server to another while the VM is running and without losing more than {X} pings. Explain to us how your solution will achieve this.
* ***Metering/Showback –*** {Company name} wants to use a showback strategy by department and/or user. Describe the capabilities of the proposed solution in terms of showback. What reporting tools are available? What levels of granularity be measured? What management capabilities are there to streamline showback functionality?
* ***Automation/Scheduling –*** {Company name} requires resources to automate and schedule VM migration and activity and re-activating host servers. This is required to improve application processing during high workloads, migrate or consolidate VMs to fewer servers, and power down servers to conserve energy.
* ***Self-Service –*** {Company name} plans to enable self-service VM provisioning and management in the next three years. Please either provide the capabilities of self-service provisioning and management within the solution, or make a case for an advanced solution with an implementation schedule.

# **Selection Criteria**

{Company name} will use multiple criteria to select the most appropriate partner. Respondents are encouraged to be as aggressive and creative as possible in their proposals. The following list summarizes the major qualitative areas that will be evaluated, along with their overall weighting.

* Industry expertise and experience
* Security and business risk
* Architecture
* Requirement satisfaction
* System administration
* Capability
* Expressed Interest
* Vendor strength and stability
* Reporting capabilities
* Financial considerations

# **Response Contents and Format**

Please complete all sections of the RFP. If additional material is required for one or more questions, please label attachments clearly and reference them in your response. Your response to this RFP will serve as the basis for the consideration of your potential as a partner.

# **Information Requirements**

For the purposes of understanding more about your company and your ability to successfully fulfill this important {Company Name} requirement, please provide the information below as part of your response, clearly referencing each specific question.

## **Corporate Information**

1. Give a brief overview of your organization’s involvement in providing IT value added services in the marketplace.
2. How long has the organization been in this business and what is your current market share?
3. Provide your organization’s annual sales volumes
4. In what Canadian cities do you maintain offices?
5. Indicate the number of employees in your organization. How many of those are dedicated to account management and/or technical support?
6. How many are full-time vs. contract?
7. Please describe your relationships and experience with manufacturers and major distribution partners in the Canadian technology marketplace.
8. What differentiates your organization from your competitors in the marketplace and how will this be relevant to us?
9. Will you subcontract any components of the proposed solution to third party organizations? If so, please describe the components to be subcontracted and provide details of any agreement in place with the subcontracted firm/individuals as well as a summary of past work that you have successfully completed together.
10. Please describe your organization’s experience in transitioning clients to public or private cloud technology from more traditional IT service models.
11. Please provide details of three current customer accounts that are similar in scope and requirements to those of {Company Name}.

## **Technical Requirements**

1. Architectural Map. Detailed map of the solution, technical requirements are indicated and the server layer, transport layer and access device layer are explicitly identified
2. Server Capacity Recommendation. Recommendation of the required server capacity to host the solution: number of VMs per server/socket, amount of memory per VM
3. Storage Capacity Recommendation. Recommendation of amount of storage capacity is needed, total storage requirements per VM and for the solution
4. Network Capacity Recommendation. Total network capacity requirement per VM.
5. Integration with Existing Network Acceleration Technologies. Description of how the solution with work with WAV acceleration technologies for improved remote office connectivity and backup.

## **Proposed Approach and Solution**

1. Please provide a proposed work plan for a migration to your organization as a {Company name} preferred vendor. Specifically, provide the following information:
   1. Key activities
   2. Timing
   3. Information/resource requirements from {Company name}
   4. Deliverables
   5. Key milestones, checkpoints, and other decision points
2. If we elect to move forward with your organization, what {Company name} resources would you require (e.g., information, data, staff resources, communication) during the course of migration and on an ongoing basis?
3. Please identify the team that will be assigned to the account and describe how you plan to interact with us and any third party providers that may provide services to {Company name}.
4. Please describe your experience in providing server technology and service for your customers, focusing on planning, implementation, and ongoing support.
5. Can you provide specific examples of how you have worked with customers that began with significant technology limitations and helped to successfully transform them into organizations with well planned and executed technology strategies? What were the critical success factors in this transformation?
6. How can we be confident that hardware pricing levels will be aggressive and will remain highly competitive over a multi-year period during which new models may be introduced?

## **Sizing and Implementation**

1. 30 Day Utilization Analysis. The vendor will use a capacity analysis tool to provide an analysis of the active server workloads. It will also include an analysis of the current resource use of VM over a period of less than 30 days.
2. Model VM Requirements. The vendor will model the requirements for candidate workloads to function in a virtualized environment. This will include modeling functionality on new server hardware that the vendor may or may not also be providing.
3. P2V Services. The vendor will manage the physical to virtual migration of workloads. The vendor will also set a contingency plan for an unexpected failure where a workload cannot perform in the virtualized environment, and will document a repeatable process for future migrations.

## **Support**

1. Describe fully your customer support options including the assistance request process, escalation process, support hours, response times, staffing levels, staff expertise, and physical location of the help desk.
2. Describe fully your implementation support options, with turnkey on-site implementation and project management support.
3. Please provide details on your standard reporting capabilities.
4. Describe any documentation and support (e.g., technical documentation, user manuals, online help, interactive demos, web-based seminars, and online knowledge base) that will be available, both from the technical perspective and the end user perspective.
5. How do you monitor customer satisfaction and quality assurance on an ongoing basis and how might we benefit from this process?
6. Describe any support for future software releases and updates to all applications as part of regular maintenance.

## **Financials**

{Company name} has a total budget of {$$$} {currency type} for this project. Please fill out the following cost breakdown for the implementation of the proposed server virtualization solution. The vendor must agree to keep these prices valid for {# of days} as of {date, time, time zone}.

Five Year Total Cost Summary

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Five Year Total Cost Summary** | | | | | | |
| Costs | Total | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
| Server Hardware |  |  |  |  |  |  |
| Other Hardware (eg. SAN) |  |  |  |  |  |  |
| Windows Server OS Licensing |  |  |  |  |  |  |
| Other Server Licensing (if applicable) |  |  |  |  |  |  |
| Documentation & Training |  |  |  |  |  |  |
| Maintenance |  |  |  |  |  |  |
| Installation |  |  |  |  |  |  |
| Integration |  |  |  |  |  |  |
| Project Management |  |  |  |  |  |  |
| Miscellaneous |  |  |  |  |  |  |
| Other (Please Specify) |  |  |  |  |  |  |
| Total: |  |  |  |  |  |  |

# **Communications and Response**

{Your name} is the designated {Company name} representative for this initiative. For any information relative to this RFP, please direct all inquiries to {his/her} contact information is as follows:

{Full Name}

{Company Name}

{Email}

{Phone}

# **Notification of Intent to Respond and Clarification Questions**

Please indicate your intention to respond, by email, to the above email address by the *Intent to Respond and Questions Due* date outlined in the *Key Dates* table below. In addition, please provide the contact details of the individual responsible for coordinating your RFP response. At the same time, we ask that you submit any clarification questions regarding the RFP. Answers will be provided to all respondents by the *Answers Provided* date.

# **Response Delivery Instructions**

Please submit an electronic copy of your proposal to the email address indicated in the *Communications and Response* section above. All responses must be received on or before close of business {5:00 pm ET} on the *Proposals Due* date indicated in the *Key Dates* table below.

# **Vendor Presentations**

Our intention is to hold presentations/demonstrations with one or more firms on the *Presentations* dates indicated in the *Key Dates* table below. The presentations will be held at {Company Name} at {Address} and we will endeavour to provide the successful firms with as much advance notice as possible.

# **Key Dates**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Event** | **RFP Issued** | **Intent to Respond and**  **Questions Due** | **Answers Provided** | **Proposals Due** | **Presentations** |
| **Date** |  |  |  |  |  |
| **Time** |  |  |  |  |  |

# **No Obligation**

The submission of a proposal shall not in any manner oblige {Company name} to enter into a contract or to be responsible for the costs incurred by your organization in responding to this request.

# **Agreement of Non-Disclosure**

This document is considered to be proprietary and shall not be disclosed to any other party. It is designed, developed and submitted to potential partners of {Company Name} solely for the benefit of {Company Name}.

# **No Guarantee**

{Company name} makes no guarantee of future volumes and offers volume information for directional purposes only, to assist vendors with proposal preparation.

# **IT RFP Evaluation Scorecard**

Before giving to reviewers the Procurement Team Leader should enter each evaluation criteria to be scored in first column and indicate the priority level under the “multiplier” column.  The evaluation criteria with the highest priority will have the highest multiplier, e.g., “x 10” and the lowest priority criteria will have the lowest multiplier, e.g., “x 1”.  Multiply the multiplier by “5” to obtain the highest number of points for each criteria (since “5” is the highest score).

***Reviewers must check one score (0-5) for each criteria.  Multiplying the marked score by the multiplier will result in the total points awarded for that criterion***

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| NAME OF BIDDER:  RFP TITLE:  NAME OF REVIEWER: | ***Score***  ***Unsatisfactory***  ***0 pts*** | ***Score***  ***Satisfactory***  ***1 pt*** | ***Score***  ***Good***  ***2 pts*** | ***Score***  ***Very Good***  ***3 pts*** | ***Score***  ***Excellent***  ***4 pts*** | ***Score***  ***Outstanding***  ***5 pts*** | Multiplier | Points Awarded  (mark score from (0-5 and multiply by multiplier) | Maximum Points Available  (5 x multiplier) |
| ***EVALUATION CRITERIA LISTING*** |  |  |  |  |  |  |  |  |  |
| EXAMPLE - 1 |  |  |  |  |  | XX | (x 5) | 25 | 25 |
| EXAMPLE - 2 |  |  |  | XX |  |  | (x 2)) | 6 | 10 |
| EXAMPLE - 3 |  |  | XX |  |  |  | (x 1) | 2 | 5 |
| 1.     Industry expertise and experience |  |  |  |  |  |  | (x \_\_) |  |  |
| 2.     Security and business risk |  |  |  |  |  |  | (x \_\_) |  |  |
| 3.     Architecture |  |  |  |  |  |  | (x \_\_) |  |  |
| 4.     Requirement satisfaction |  |  |  |  |  |  |  |  |  |
| 5.     System administration |  |  |  |  |  |  | (x \_\_) |  |  |
| 6.     Vendor strength and stability |  |  |  |  |  |  | (x \_\_) |  |  |
| 7.     Account management |  |  |  |  |  |  | (x \_\_) |  |  |
| 8.     Reporting capabilities |  |  |  |  |  |  | (x \_\_) |  |  |
| 9.     Financial considerations |  |  |  |  |  |  | (x \_\_) |  |  |
| 10.     Capability |  |  |  |  |  |  | (x \_\_) |  |  |
| 11.     Expressed Interest |  |  |  |  |  |  | (x \_\_) |  |  |
| Comments on individual score selections or general comments during review of response: | | | | | | | | | |