

{Insert Your Logo Above}

Request for Proposal Template

Outsourced IT & Managed 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.

Table of Contents

[1 Request for Proposal (RFP) 3](#_Toc387931470)

[2 Introduction to {Company Name} 3](#_Toc387931471)

[3 Overview of Current {Company Name} Technical Environment 3](#_Toc387931472)

[4 Value Added Service Requirements 3](#_Toc387931473)

[5 Selection Criteria 3](#_Toc387931474)

[6 Response Contents and Format 3](#_Toc387931475)

[7 Information Requirements 3](#_Toc387931476)

[**7.1** **Corporate Information 3**](#_Toc387931477)

[**7.2 Proposed Approach and Solution 3**](#_Toc387931478)

[**7.3 Support 3**](#_Toc387931479)

[**7.4 Financials 3**](#_Toc387931480)

[8 Communications and Response 3](#_Toc387931481)

[9 Notification of Intent to Respond and Clarification Questions 3](#_Toc387931482)

[10 Response Delivery Instructions 3](#_Toc387931483)

[11 Vendor Presentations 3](#_Toc387931484)

[12 Key Dates 3](#_Toc387931485)

[13 No Obligation 3](#_Toc387931486)

[14 Agreement of Non-Disclosure 3](#_Toc387931487)

[15 No Guarantee 3](#_Toc387931488)

[**it rfp evaluation scoreboard 3**](#_Toc387931489)

# **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 IT managed services 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}**

# **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
* 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?

# **Value Added Service Requirements**

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

 {Examples listed below}

* ***Remote backup*** – Executing a nightly backup plan for the critical servers, including a regularly-tested recovery process.
* ***Technology strategy planning*** – Working with current IT staff to develop a long term strategic technology plan. The plan will take advantage of new and existing technologies to produce a pragmatic and effective future roadmap that enables the organization to fulfill its overall mandate in the community.
* ***Solution design*** – Solution packages (e.g., hardware, software, licensing) and associated consolidation of data
* ***Network and email system monitoring***– 24/7 monitoring of {Company Name}’s network and email services with proactive communication and escalation protocols based on the severity of any unscheduled outages.
* ***Procurement management***– Selection of commercially rated equipment, order placement, order tracking, shipping, equipment returns, and sourcing and ordering of replacement parts.
* ***Move, Add, Change (MAC)***– Changes to the location or configuration of existing equipment or software, and installation of additional equipment or software.
* ***Warranty, break fixes and installation*** – Planned and on-call services, including emergency response to server issues.
* ***Technical support*** – Ability to support {Company Name}’s inquiries as required, via help desk, including support for remote users.
* ***Reporting and communication*** – Ensuring monthly reporting on all purchases, assets, current activities and issues, and project status reports.
* ***IT policy review and development*** – Development of customized policies related to the use of technology.
* ***Unit evaluation and testing*** – Formal evaluation of new hardware
* ***Implementation planning and guidance*** – Assistance in deployment planning and execution.
* ***Image development and management services*** – Assistance in planning and designing standard images.
* ***Image loading*** – Prior to delivery and installation.
* ***Configuration*** – Full assembly of hardware and software, including testing and burn-in.
* ***PC deployment*** – Delivery and setup of machines on-site.
* ***On-site implementation of business applications*** – Installation of non-image software.
* ***Asset inventory management*** – Tagging, tracking, and management of warehousing and inventory.
* ***Life cycle management of hardware units*** – Process for end-of-life notification, replacement, and asset decommissioning/disposal.
* ***Software licensing control*** – Oversight of automatic renewal of software applications and maintenance of appropriate documentation
* ***Warehousing*** – Maintain an inventory of standard stock units on behalf of {Company Name}

# **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
* Demonstrated customer service quality and support
* Previous relevant experience
* Vendor strength and stability
* Account management
* 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}.

## **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 the following value-added services:
	1. Remote backup
	2. Technology strategy planning
	3. Solution design
	4. Network and email system monitoring
	5. Procurement management
	6. Move, Add, Change (MAC)
	7. Warranty, break fixes and installation
	8. Technical support, including remote user support
	9. Reporting and communication
	10. IT policy review and development
	11. Unit evaluation and testing
	12. Implementation planning and guidance
	13. Image development and management services
	14. Image loading
	15. Configuration
	16. PC deployment
	17. On-site implementation of business applications
	18. Asset inventory management
	19. Life cycle management of hardware units
	20. Software licensing control
	21. Warehousing
5. Please describe your experience in providing server technology and service for your customers, focusing on planning, implementation, and ongoing support.
6. 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?
7. 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?

## **Support**

1. Describe fully your technical 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. Please provide details on your standard reporting capabilities.
3. Describe any documentation and support (e.g., 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.
4. What options are available for user training and technical training that may be required by our staff?
5. Describe any user groups, websites, newsletters, conferences, or any other means you support for sharing information and soliciting service feedback.
6. How do you monitor customer satisfaction and quality assurance on an ongoing basis and how might we benefit from this process?
7. The {Company name} user base varies considerably in its level of technical sophistication. Please describe your experience in successfully supporting users that may be remote and possess limited technical skills.

## **Financials**

1. Describe the pricing model(s) that you typically employ for your standard services.
2. What is the standard markup that you charge on the following types of technology units:
	1. Desktops
	2. Laptops
	3. Servers
	4. Other hardware
	5. Software
3. Please indicate the charges associated with each of the following services in Canadian dollars, including the key driver of each cost and whether it is included in a standard per-unit cost vs. charged on an ad hoc basis.
	1. Remote backup
	2. Technology strategy planning
	3. Solution design
	4. Network and email system monitoring
	5. Procurement management
	6. Move, Add, Change (MAC)
	7. Warranty, break fixes and installation
	8. Technical support
	9. Reporting and communication
	10. IT policy review and development
	11. Unit evaluation and testing
	12. Implementation planning and guidance
	13. Image development and management services
	14. Image loading
	15. Configuration
	16. PC deployment
	17. On-site implementation of business applications
	18. Asset inventory management
	19. Life cycle management of hardware units
	20. Software licensing control
	21. Warehousing
4. Do you offer service bundles and if so, describe the effect of this bundling on pricing.

# **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.     Demonstrated customer service quality and support |  |  |  |  |  |  | (x \_\_) |  |  |
| 3.     Previous relevant experience |  |  |  |  |  |  | (x \_\_) |  |  |
| 4.     Vendor strength and stability |  |  |  |  |  |  | (x \_\_) |  |  |
| 5.     Account management |  |  |  |  |  |  | (x \_\_) |  |  |
| 6.     Reporting capabilities |  |  |  |  |  |  | (x \_\_) |  |  |
| 7.     Financial considerations |  |  |  |  |  |  | (x \_\_) |  |  |
| Comments on individual score selections or general comments during review of response: |