RFP Template

Document Version: 1.0

Your Company Name

Authors Name

Authors Job Title

first.last@yourcomany.com

0121 234 567

28/01/2021

# Document Information

## Disclaimers

This document is the proprietary and exclusive property of (Company Name) except as otherwise indicated. No part of this document, in whole or in part, may be reproduced, stored, transmitted, or used for design purposes without the prior written permission of (Company Name).

The information contained in this document is subject to change without notice.

The information in this document is for information purposes only. (Company Name) disclaims all warranties, express or limited, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose, except as provided for in a separate software license agreement.

This document is maintained as an electronic document. Please contact the author for the latest version.

## Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| Document Version | Date | Summary of Changes | Revision Marks |
| Document Version: 1.0 | 28/01/2021 | RFP Template | Authors Name |

Table of Contents

[Document Information 1](#_Toc4149235)

[Disclaimers 1](#_Toc4149236)

[Revision History 1](#_Toc4149237)

[1 Request for Proposal(RFP) 3](#_Toc4149238)

[2. An Introduction to (Company Name) 3](#_Toc4149239)

[3. Technical Environment Specifications 3](#_Toc4149240)

[4. Business Requirements 4](#_Toc4149241)

[5. Selection Criteria 6](#_Toc4149242)

[6. Information Requirements 6](#_Toc4149243)

[6-A: Company Information 7](#_Toc4149244)

[6-B Your Proposal 7](#_Toc4149245)

[6-C: Support Functions 8](#_Toc4149246)

[6-D Pricing Schemes 8](#_Toc4149247)

[7.Correspondence 9](#_Toc4149248)

[8. Key Response Dates 9](#_Toc4149249)

[9. Terms and Conditions 9](#_Toc4149250)

# Request for Proposal(RFP)

*Provide a formal introduction to your RFP; let prospective bidders know your company name, the purpose of the RFP, and the nature of the request. It’s a good idea to keep this section short.*

*Though it might be tempting to provide a solution, it’s better to only describe the problem you’re having – that way, prospective bidders will be able to provide a wide range of solutions rather than one you may think you need, have already discussed or designated.*

**EXAMPLE**: For your consideration, (Company Name) submits this Request for Proposal (RFP). The request is for a single enterprise to provide a Managed IT Service to (Company Name) commencing (insert date). We seek an ongoing Managed IT Service which manages and monitors the ongoing security requirements of our email and internet. The company requires confirmation of GDPR compliance, in particular the protection of our personal data, as well as a Managed Print System with particular provisions for print security and cost monitoring.

## 2. An Introduction to (Company Name)

*Who are you and who do you want to work with? The result of your RFP should be a partnership that rewards both parties. You want to attract the right partner, and they want to work with a like-minded, value-adding enterprise. Tell your prospective partners about your company’s work ethic, objectives and achievements since its incorporation. Be unique and demonstrate value.*

*In this example, we’ll pretend to be a Medical Health Training Company.*

**EXAMPLE**: We are (Company Name) – an award-winning Professional Medical Health Training Company. Our solutions are specifically designed for small-to-medium businesses and their individuals, with clients from a wide range of professions and courses for all specialties.

Incorporating Team Training, Online Courses, 1-to-1 Tuition, Open Days and Personal Assessments, our Medical Training Services work to the needs of the client, allowing them to learn all they need in the manner that works best for them.

By tailoring our solutions to the specific needs of each of our clients, we provide bespoke and personable service with long-term commitment in mind.

### (Company Name) Facts

* Located in Milton Keynes with a second office in Birmingham.
* Founded in 2004, with 80 employees on-site and a team of 20 regular off-site workers.
* Recent Winners of various industry awards including…
* Healthcare Support Provider for over 1,000 small-to-medium enterprises.
* Accredited Partners of such companies as…
* Certified in such credentials as…

Our culture is passionately centred on providing complete customer satisfaction. An abundance of technical qualifications and product expertise are used along with consistently clear communication. This allows us to identify and deliver the right solution for our clients’ needs.

## 3. Technical Environment Specifications

*Detail the facilities, specialties and technologies that you currently own and operate. In this instance, you’re looking for a managed service provider, so pay particular attention to the details of our current IT setup. What operating systems do you use? What hardware? Who provides your security, networks, and print solutions?*

*Your business is unique, and as such you might be employing some services or facilities which compliment or conflict with your IT setup. If you think these details are important, provide them; that way, your prospective bidder can make plans more tailored to your company’s specific, current scenario.*

*Ensure you describe your business strategies, how current technology helps you to deliver on these strategies, and how any prospective proposal should fulfil the future needs of your company.*

**EXAMPLE**: Our strategy at (Company Name) is to introduce a whole new generation of learners and influencers to our award-winning products and services. Our goal is to be people-focused and people-driven, delivering a service that goes beyond the client/supplier relationship. Currently, we operate within a subscription-based Office 365 environment, with the majority of employees working on Microsoft Windows and our designers utilising Apple Macintosh hardware and dedicated software.

Over the past three years, our services have moved from on-prem solutions to cloud and SaaS services, expanding the capabilities of our workforce and the possibilities for our clients. We are now looking to strengthen the security of our client’s personal details, operate a safer work environment, and facilitate our ongoing commitment to security with ongoing training and phishing awareness courses.

### Technical Specifications:

**Servers –** 2 x HP DL380 Server Hosts running Microsoft Hyper-V. VM’s include File, Print, CRM (SQL based), SAGE, RDS for remote users. Hardware is 3 years old and is on extended warranty. All servers are running Windows OS.

**Internet Provider** - Fibre Max 1 Broadband from EE, providing 145Mb/S.

**Operating Systems** - Laptops running Windows 10 and Macbooks running macOS Mojave.

**Workforce** - 80 employees on-site and a team of 20 regular off-site workers.

**Firewall** - Sophos XG V17.5.

**Security** - Spam filtering and email security.

**Endpoint Protection** - Webroot.

**SaaS Solutions** - Office-based and Remote working with Office 365.

**Backup** – ACME Disaster Recovery Solution.

**Standardised Software** – Microsoft Office 365, Google Chrome, WinAuth and Avast Business Antivirus Pro.

### Considerations

* What sort of building are you based from? A high-rise building, a shared office, a rural location? Are there any specific considerations for your place of work/premises?
* Are there any special considerations for the IT provisions for any users/employees?
* Are there any future projects or plans that will need to be considered in this proposal?
* If you have remote users, how do they connect?
* If you have a current incumbent, list the current services and support they provide.

## 4. Business Requirements

*You’ll want to provide details on everything you want implemented, such as the appropriate services and functions. This could be anything from the examples provided below - sometimes more, sometimes less. Detail each service you want implemented and what you want the outcome of these services to be.*

*Don’t only think about your technology; consider things such as your staff requirements. Do they need extra training? You might also want to obtain a Cyber Essentials accreditation, comply with GDPR regulations, or set up your software for auto-renewal. Here, you simply want to outline everything your company wants from this solution.*

Current priorityservices for this RFP include:

### Technical Support

* Capabilities for Installs, Moves, Adds and Changes (Imac’s), allowing existing equipment to be relocated or amended, along with supporting software and hardware.
* Fully-featured support for all employees (including remote workers) via help desks, On-Site Technicians and ongoing coverage.
* Monthly Invoicing and Reporting – Monthly reports on all costs, incorporating purchases, project updates, issues and recurring payments.
* Full installation, testing and activation of all software and hardware.
* A managed IT policy for proper technology use, which compliments the best practices and policies of the business.
* Regular evaluation of existing technologies and preliminary evaluation of all new technologies.
* Manage stock and warehousing with dedicated inventories.
* Ensure software and all relevant documentation is renewed automatically.
* Support and compliance with all GDPR procedures.
* Support for integrating SaaS services with all current and future hardware adoptions.
* Warranty covering breaks and fixes, as well as emergency responses via On-Site Technicians.
* Managing lifecycles of all new and outgoing hardware and devices.
* Guidance and planning on deployment procedures.
* All relevant software installed, tested and activated.
* A Technology Strategy, collaborating with staff of (Company Name) to develop, track and implement new or existing technologies along with a strategic roadmap to ensure the business objectives align with the technical capabilities.
* Increased IT Security.
* Email Security and Spam Filtering.
* Remote backup solutions (when necessary).
* Procurement Management.
* Managing print and reducing print costs.

**Security**

* Security training for all on-boarding staff members.
* Implementation of spam filtering and email scanning.
* Firewall protection.
* Ongoing phishing awareness training.
* BYOD Policy.

**Backup and Disaster Recovery**

* Incremental, remote backup.
* **Connectivity and Telephony**
* Implementation / support for a hosted telephony service.
* Implementation of a Mobile Telephony Solution.
* Secure MPLS internet service offering average speed of 18 MB/S.

## 5. Selection Criteria

*Here, you can break down what credentials your partner should be boasting piece-by-piece, designating the importance of each based on a percentage scale. You don’t have to split each of these equally – for example, the appropriate security credentials might be a more important consideration than your bidder’s client retention rate – and the nature and volume of your needs may differ from the examples we’ve provided.*

The below criteria indicate our selection process for finding the most appropriate business partner and provider. When presenting a tender, bidders are encouraged to incorporate each of these criteria, and any others you may require, into their answers and examples.

|  |  |
| --- | --- |
| **Criteria Examples** | **Importance** |
| Proven Experience Delivering Managed IT Solutions | ?% |
| Demonstration of Ongoing Customer Service and Support | ?% |
| Proven Record of Client Retention and Relations | ?% |
| Industry Experience (years and customers served) | ?% |
| Costing and Financial Viability | ?% |
| Proven Information Security Experience | ?% |
| Previous Experience with Similar / Relevant Proposals | ?% |
| Partner Relationships and Stability | ?% |
| Account Management | ?% |
| Reporting Skills and Capabilities | ?% |
| Anything else… | ?% |

## 6. Information Requirements

*Here, you’ll provide either a paragraph, bullet points, or perhaps even both, detailing the skills, solutions and support you’d most like your bidder to provide. It’s best to ask ‘open’ questions of your provider, ones which will require longer, persuasive answers rather than simple ‘Yes’ or ‘No’ responses. You’ll want to ask the kinds of questions that let your partner demonstrate skills and credentials, reading like a portfolio of their achievements. What follows is an opening statement, plus a list of the questions you might want answered:*

To better determine the strengths and capabilities of your company, please provide answers and examples to the questions below, referencing each question in your responses.

## 6-A: Company Information

*Ensure you have all the information about your potential partner by selecting questions that help support your final choice. Here are some examples*

* Please indicate your time spent in the industry and your company’s current business turnover.
* What skills, experience or past achievements do you believe will be of benefit when undertaking the tasks outlined in this RFP?
* Considering the requirements outlined by (Company Name), please provide details of similar-scale operations, including outcomes and feedback where possible.
* How many employees do you currently hire and how are their roles divided across your services?
* Please provide a skills matrix for the team who will support our request.
* Do you have any partner accreditations?
* Have you achieved any service standard certifications?
* What are the costs and methods your company employs when moving users from an on-prem solution to a cloud or SaaS setup?
* What else do you think we need to know that would help us decide on our provider?
* What is the breakdown of your company’s ownership?
* Can you provide three examples of companies you have provided similar solutions to previously, and referee details for each?
* What is your Company Culture and what are your Company Values?

Anything else you feel pertinent.

## 6-B Your Proposal

*Outline everything you’d like your prospective partner to consider when providing their proposal.*

What information (if any) will you require from (Company Name) when undertaking the proposed request?

* How do you plan to cater your technology solutions to the unique specifications and current technical setup of (Company Name)?
* Please outline the installation, implementation and continuing support of your proposed services and solutions and how your solution will continually support our business needs.
* What is your company’s onboarding process?
* Describe how you have tackled a particularly challenging business need in the past, and how your outcome elevated the client’s business and technological capabilities.
* Describe how you effectively balance your pricing against emerging and evolving technologies and hardware.
* Do you foresee any complications in delivering your proposed solution? If so, do you know what your contingency planning will entail?
* Ensure you provide examples of the relevant experience or accreditations in the following fields:
* Security training for both teams and individuals.
* Ongoing security provisions for long-term partners.
* Implementation of security systems including, but not limited to, Firewalls, SaaS protection, Two-Step Verification via personal devices and Phishing Training.
* Data Backup solutions.
* Disaster Recovery in the instances of security breaches, physical property damage and systems failures.
* Installation of VoIP and telephony services.
* Maintaining a large-scale connectivity solution for offices of 20 people or more.

## 6-C: Support Functions

*The best prospective bidders will have unique selling points which further the service they provide, and you receive. Have your bidder demonstrate these, and how they complement their services.*

* What is your standard procedure for raising support requests, and how are these fulfilled?
* What options for technical support do you provide for remote workers or those with less technical capabilities/responsibilities?
* What are your support staff levels and how are these distributed between each support channel?
* What are your average response and waiting times when answering a support request?
* What training options exist for the staff of clients, and what methods exist for delivering these eg: team training, online training, 1-to-1 training, etc?
* What methods do you use when monitoring customer satisfaction, and how do these help to improve your service statistics?
* Do you provide Third Party Vendor Management?

## 6-D Pricing Schemes

*You’ll want a pricing scheme that works for you and your business. Your financial template should demonstrate the pricing scheme that works best for you, and your best prospective partners will likely provide a scheme that can adhere to this format as closely as possible.*

Using the following suggested format, outline the cost of each service and any recurring costs. Add any further criteria as necessary.

Where possible, also provide details of any service bundles you can offer based on our requirements.

|  |  |
| --- | --- |
| **Monthly Costs** |  |
| **Service** | **Monthly Net Cost** |
| Helpdesk and Remote Support | £ |
| Server Maintenance | £ |
| Network Security | £ |
| Monthly Invoice Value | £ |
| Backup and Recovery | £ |
| Any other Items | £ |
|  |  |
| **Annual Costs (Incl. VAT)** |  |
| Year 1 Cost | £ |
| Year 2 Cost | £ |
| Year 3 Cost | £ |
| **Total Cost** | **£** |

Please also provide a **Project Rate Card.**

## 7.Correspondence

*Provide contact information with a designated point-of-contact for all applicants.*

For all correspondence related to the contents within or in response to this document, please consult our IT Director Joe Bloggs on the following:

|  |  |  |
| --- | --- | --- |
| **Correspondence** |  |  |
| **Name** | **Email** | **Telephone** |
| Joe Bloggs | [joe.bloggs@generic.com](mailto:joe.bloggs@generic.com) | 01111 111111 |

## 8. Key Response Dates

*You will need to provide dates for when the RFP was first submitted, as well as dates for responses such as the Intent to Respond and the submission of any answers and examples requested of your bidders.*

As of the date of this Request for Proposal, documented as (**DD/MM/YYYY)**, we await responses to our key requirements on the following dates. Please ensure that any documents are submitted in an electronic format to the email address outlined above.

|  |  |
| --- | --- |
| **Key Responses** | **Deadline** |
| Intent to Respond | DD/MM/YYYY |
| Submittal of Questions (by Bidder) | DD/MM/YYYY |
| Question Responses (by Company) | DD/MM/YYYY |
| Proposal Submitted | DD/MM/YYYY |
| Proposal Meeting /Presentation | DD/MM/YYYY |
| On-Boarding Start Date | DD/MM/YYYY |
| Go-Live Start Date | DD/MM/YYYY |

## 9. Terms and Conditions

*Provided here are terms and conditions designed to protect your company from any conflicts or confusion. You may wish to apply more terms or rules to your RFP, but these should not be instructive, they should be more conditional.*

9-A: The submittal of any proposal does not guarantee any contract, nor does it oblige (Company Name) to enter into any agreements with the bidder, whether in relation to the proposal or otherwise.

9-B: This document is designed only for potential partners of (Company Name) and is not to be shared, distributed or disclosed to any other persons, enterprises or third parties.

Closing Statement from Mirus

*The examples provided in this RFP Template are for demonstration purposes only. While each segment is designed to contain all imperative information, you may decide to add extra considerations or amend the presentation of such things as your finance tables or lists, to better suit your company needs. Your requirements are unique – so too should your RFP be.*

*If you’re having difficulty identifying the current status and needs of your infrastructure, Mirus can help with such services as our Free Network Health Check. We can also advise on any of the examples provided in this RFP, and more. See* [*our website*](https://www.mirus-it.co.uk/) *for a full list of services provided.* [*Get in touch*](mailto:enquiries@mirus-it.com?subject=Getting%20in%20touch,%20as%20I've%20seen%20the%20example%20RFP%20Document) *to know more, or call 01908 257350.*