



Request for Proposal Managed IT Services

<insert date>
Draft

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1 Introduction

1.1 Project Description

AnyCo is soliciting vendors for proposals to manage their IT services. AnyCo intends to modernize their IT environment and change managed services providers in the process.

1.2 Firm Overview

<insert description>

1.3 Project Objectives

Specific project objectives include:

- <insert objective>
- <insert objective>
- <insert objective>
- <insert objective>
- <insert objective>
-

1.4 Current Environment

<insert description>

1.4.1 Employee Count

<insert description>

1.4.2 Conference Rooms

<insert description>

1.4.3 Internet Connectivity

<insert description>

1.4.4 Voice Services

<insert description>

1.4.5 Wireless Networking

<insert description>

1.4.6 Office Print, Fax, and Copy Services

<insert description>

1.4.7 Equipment Room

<insert description>

See appendix for rack layout and inventory of server room equipment.

1.4.8 Applications

<insert description>

See appendix for a list of virtual servers.

1.4.9 Remote Access

<insert description>

1.4.10 Personal Computers

<insert description>

See appendix for inventory of personal computer hardware and software.

1.4.11 File Shares

<insert description>

1.4.12 Backups

<insert description>

1.4.13 File Sharing

<insert description>

1.4.14 Current Support Model

<insert description>

2 Request for Proposal (RFP) Process

2.1 RFP Objective

The objective of this RFP is to collect the information necessary to evaluate each vendor's ability to fulfill AnyCos requirements to upgrade their IT environment and outsource their IT services. The answers you provide will contribute to AnyCo's selection process. The information requested includes details about your company, business model, organization, capabilities, products, and solutions.

2.2 Confidentiality

This Request for Proposal (RFP) is confidential and proprietary. Distribution of the document for purposes other than providing a response to AnyCo is prohibited.

2.3 Instructions for Responding to the RFP

This section defines the proposal submission procedures as well as general terms and guidelines that must be followed by all vendors.

2.3.1 RFP Confirmation

Upon receiving this RFP, please confirm receipt with an e-mail addressed to Contact Name (cname@anyco.com) with the following information.

- Confirm receipt of the RFP
- Your company's intention to respond to the RFP
- Applicable contact information

2.3.2 Due Date and Submission Requirements

Please submit your complete RFP response electronically to Contact Name (cname@anyco.com) no later than <insert time> on <insert date>.

2.3.3 RFP Response Structure

An evaluation of proposals is made more efficient when all vendors respond in a similar format. The following are guidelines in creating your responses to applicable sections in this RFP document.

Provide your responses in a separate electronic copy of this MS Word document. The document identifies each requirement and provides space following each requirement for inserting your response.

If you need to attach additional files or exhibits, please include the file name immediately following the question.

For any questions or clarifications, please contact Contact Name (cname@anyco.com).

2.4 Vendor Presentations

In addition to the RFP responses, each vendor will have the opportunity to deliver a presentation in-person to the AnyCo team. The presentation will be performed onsite at the AnyCo office. The presentation will take place at a date and time agreed upon by both AnyCo and the vendor.

2.5 AnyCo Assessment of Vendors

The AnyCo project team will review the responses to the RFP and the information gathered during the presentations and meetings to evaluate the vendor's ability to fulfill AnyCo's requirements.

3 Company Profile

In the following section, you are asked to provide details on your organization, client base and operating model as they relate to your company's ability to provide solutions to AnyCo.

3.1 Organization

3.1.1.a How many years has your company been servicing the business community? Describe how your business has evolved since then to its current state.

3.1.1.b Provide an overview of your organization detailing the major groups, the functions they perform (include an organizational diagram), the number of people in each group/function and the location (country and city).

3.1.1.c Provide biographies of the management team in your organization, specifically noting the tenure at your company and their significant knowledge and experience in the industry. Resumes and LinkedIn profiles are acceptable.

3.1.1.d What distinguishes your company from your competitors?

3.2 Client Profiles and References

- 3.2.1.a Describe the profile of your customer base in terms of number of the number of seats and servers supported. How many small, medium, and large customers do you support? Define small, medium, and large in terms of number of seats and servers supported.
- 3.2.1.b What geographies do you support? Where are your clients? Identify the distribution of clients by geographic location.
- 3.2.1.c Where are your employees located? Identify the distribution of your employees by geographic location.
- 3.2.1.d What industries (business verticals) do you specialize in? Are your customers primarily from a particular industry or industries? Please describe.
- 3.2.1.e Provide a sample list of your clients using the format shown below. Include clients of comparable size to AnyCo, smaller, and larger customers. Describe their size, the length of time you have been servicing them, followed by the specific services you provide for them.

Sample Customer AnyCo

120 people, 100 personal computers, 15 servers, 8 years

<description of services>

- 3.2.1.f Provide contact information including phone number and e-mail of the key client contact for up to three referenceable clients with similar profiles to AnyCo.
- 3.2.1.g Identify all clients whose relationships have been terminated in the last five years. Explain why the client terminated the relationship and to whom the business was awarded.

3.3 Financial Stability

3.3.1.a How would you characterize your company's financial stability using financial metrics and measures rather than marketing terminology?

3.3.1.b Provide a historical overview of your company's growth over the past five years by revenues, clients, and employees.

3.4 Vendor Operating Model

3.4.1 General

- 3.4.1.a Describe the products and services that you offer. What percentage of your business is related to the managed services being sought by AnyCo?

- 3.4.1.b Explain if and to what extent you will provide a relationship manager with access to executive management, other than the implementation or technical support contact, for escalation of issues as needed.

- 3.4.1.c What are your hours for technical support? Where is your technical support team located?

- 3.4.1.d How do customers engage with your support team? Phone, email or ticketing system?

- 3.4.1.e How do you provide onsite support? Describe your model for providing onsite support 1) on a regularly scheduled basis, 2) on an emergency basis, 3) on an as-needed basis.

- 3.4.1.f Describe your service level commitments for support requests.

3.4.2 Processes

3.4.2.a Describe the process by which you handle the escalation of critical and non-critical issues reported by clients?

3.4.2.b How often do you schedule meetings with your clients to discuss key issues, service levels, staffing changes and other business updates that may impact the support received by AnyCo?

3.4.2.c Describe the user documentation that will be available to AnyCo users.

3.4.2.d Describe the training that will be available to AnyCo users.

4 Ability to Meet Project Objectives

Describe how your service meets the key objectives of the AnyCo RFP listed below.

4.1.1.a <insert objective>

4.1.1.b <insert objective>

4.1.1.c <insert objective>

4.1.1.d <insert objective>

5 Infrastructure Support Expertise

5.1.1.a Describe your ability to support the current server room infrastructure listed in the appendix.

6 Pricing

6.1 Proposal

Please provide the fee structure for your solution, including a detailed explanation of each item.

- Separately itemize the fees for each module or component of the service.
- Where different options exist (e.g., standard vs. full suite), clearly itemize the specific additional features provided and their costs.
- Provide descriptions, configurations, and pricing for all hardware requirements.
- Clearly identify fees that are recurring, one-time, fluctuating based on volume and fixed rate fees.
- Identify hourly limits placed on monthly and annual fees. Identified billable rates after hourly limits are exceeded.

6.2 Implementation Fees

Please provide a detailed explanation of the fee structure for implementation activities.

7 Vendor Technology Platform

7.1 System Architecture

7.1.1.a Describe the technical platform you use to support clients.

Include:

1. Software agents installed on personal computers and servers
2. Inventory software
3. Network monitoring software
4. Service request applications
5. Patch maintenance software
6. Remote access tools
7. Personal computer imaging software
8. Custom software you have developed for support purposes

7.1.1.b Describe the technology stack that you support and the technology stack that you prefer to recommend for your clients. Include your preferred vendor hardware and software products. Describe the subject matter expertise and certifications of your employees as it relates to your recommendations.

7.2 Data Security

7.2.1.a Please describe your security policies and procedures with regards to how you control access to customer data while performing network maintenance, troubleshooting, and end user support.

7.2.1.b Describe your incident response and handling procedures around security breaches.

7.2.1.c Provide details of your access administration policies and procedures, including:

- Policies for approving access and control rights.
- Processes for periodically reviewing access.
- Processes to revoke access upon employment transfer or termination.

7.2.1.d Describe the access procedures you use to perform remote troubleshooting and support.

7.2.1.e Describe the backup protocol that is utilized to maintain client data. Are backups encrypted? How are backups managed? Where are backups maintained?

7.2.1.f Describe your relationship with Microsoft. What certifications do your employees have? What certifications does your company have?

7.3 Disaster Recovery

7.3.1.a What services and configurations do you recommend for disaster recovery and business continuity?

8 Implementation

Please respond to the following questions regarding the implementation of your company's products.

- 8.1.1.a Explain your implementation methodology and the migration approach that will be applied at AnyCo.

- 8.1.1.b Describe the implementation team's experience with clients that are similar to AnyCo.

- 8.1.1.c What would be the approximate implementation timeframe for AnyCo?

- 8.1.1.d What is the technique used for training (e.g., classroom, online, train the trainer)?

- 8.1.1.e Describe ongoing training options that would be available to AnyCo employees.

- 9 Appendix A – Floor Plan**

- 10 Appendix B – Wiring**

- 11 Appendix C – Server Room Inventory**

- 12 Appendix D – Virtual Machines**

- 13 Personal Computer Hardware and Software Inventory**