Managed Service Provider Request for Proposal

[Company Name]

Issued Date: [MM/DD/YYYY]

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### 1. Introduction

[Company Name] is pleased to invite you to respond to this Request for Proposal (RFP) for Managed IT Services. The intention of this RFP is to solicit responses and formal proposals from qualified Managed IT Services Providers (MSPs) and select a single organization to provide a comprehensive set of IT services to [Company Name].

#### 1.1 About

[Company Name] is a [Company Description & Values]

#### 1.2 Purpose

With this RFP, [Company Name] is requesting information about your company and the IT products and solutions you provide; as outlined in the Service Requirements section. This information will be gathered from several different organizations and used to evaluate provider options for [Company Name].

This RFP is issued for the purpose of **possibly** selecting a Managed Services Provider. *This document does not commit [Company Name] to contract for any service, supply, or subscription whatsoever*. [Company Name] will not reimburse any information or administrative costs incurred because of participation in response to the RFP. All costs associated with responses will solely reside at the responding party’s expense.

#### 1.3 Confidentiality Statement

All information included in this RFP is considered confidential and intended only for use by responders. No information included in this document, or in discussions related to [Company Name] Managed Service Provider selection effort, may be disclosed to another party, or used for any other purpose without express written or verbal consent from a [Company Name] representative.

### 2. Environment Overview

The information below outlines the general demographics of [Company Name] and our current technical environment.

**Office Locations:**

* **Headquarters** – [Company Address]

**Number of Employees:** ~ ###

**Current Technical Environment:**

**Microsoft 365 Counts**

|  |  |
| --- | --- |
| **Name** | **Count** |
| Azure Active Directory Premium P1 | ### |
| Microsoft 365 E3 | ### |
| Microsoft Teams Audio Conferencing with dial-out to USA/CAN | ### |
| Nonprofit Portal | ### |
| Office 365 E1 | ### |
| Power BI Premium Per User | ### |
| SaaS Alerts | ### |

**Network Counts**

|  |  |
| --- | --- |
| **Name** | **Count** |
| Workstations/Laptops | ### |
| Servers | ### |
| Switches | ### |
| Firewalls | ### |
| SAN/NAS | ### |
| UPS | ### |
| Access Points | ### |
| Email Domains | ### |
| Backup Data | ###.## |
| SPLA License | ### |
| SaaS Alerts | ### |

### 3. Service Requirements

As part of this RFP, [Company Name] has requirements for the following services. We realize that not every MSP will be able to provide all the services listed below, but we encourage you to respond regardless. **Additionally, all services may not be required at all locations, however we would like to understand all capabilities and costs.**

* **Help Desk Support -** The MSP should offer superior 24x7x365 Help Desk support from Tier One to Three, utilizing industry best practice processes and procedures.
* **Server & Network System Monitoring** – The MSP must provide 24x7 monitoring of [Company Name]’s server & network system with proactive communication and escalation protocols based on the severity of any unscheduled outages.
* **Patch Management Services & Preventative Maintenance** – The MSP must provide management of critical security and system patches to all servers and systems on the network to ensure [Company Name]’s IT systems and resources are properly managed and maintained.
* **Business Continuity and Disaster Recovery –** The MSP must be able to support [Company Name]’s ability to recover based on the Recovery Time Objective (RTO) and Recovery Point Objective (RPO) agreed upon by organizational constituents. In addition, backup and redundancy should be used to support this need.
* **Remote Backup** – The MSP must execute a nightly (cloud based) backup plan for the critical servers, including a regularly-tested recovery process.
* **Antivirus, AntiSpam & Antispyware Protection** – [Company Name] is looking for management of the [Company Name] solution that defends against security threats including phishing, malware, spam, viruses.
* **On-Site Support –** When needed, the MSP should have the ability to deploy onsite resources in a timely manner to assist in issues which cannot be resolved through remote access to inhouse systems.
* **Networking Support** – [Company Name] requires proactive management and monitoring of our switches, firewalls, routers and Wi-Fi systems, and other networking equipment as identified by [Company Name].
* **Security Systems Monitoring –** MSP must manage the solution that provides proactive monitoring and management of [Company Name]’s security systems, including firewalls, intrusion prevention, secure remote access, and any implementations of advanced security solutions [Company Name] may utilize.
* **Warranty and Asset Inventory Management** – [Company Name] expects the MSP to maintain a hardware and asset inventory that includes Desktops, Laptops, Servers, Printers/Scanners, Fax Machines, and notify [Company Name] of any potential service or warranty issues. The MSP must also assist with managing the lifecycle of [Company Name]’s devices and maintain an equipment inventory to ensure our systems are always current.
* **Software Licensing Control** – Oversight of automatic renewal of software applications and maintenance of appropriate documentation.
* **Procurement Management** – The MSP, at [Company Name]’s request, must assist with the selection of commercially rated equipment, order placement, order tracking, shipping, equipment returns, and sourcing and ordering of replacement parts.
* **PC Deployment** – Delivery and setup of machines on-site as needed.
* **Desktop and Laptop Support -** MSPs must include their ability to support existing and future desktop and laptop hardware. This includes maintenance and repair, replacement for failed equipment, and the acquisition and provisioning for new equipment as needed.
* **Printers, Copiers and Scanners -**The MSP must be able to support existing printers, copiers and scanner related network-printing issues.
* **Desktop Software Standardization and Software Licensing and Upgrades –** MSP must have a process for identifying standardization and management of desktop images and ensuring that staff are using current products as well as current OS and browser versions.
* **Lifecycle Management of Hardware Units** – The MSP should have processes for end-of-life notification, replacement, and asset decommissioning/disposal.
* **Break Fixes and Installation** – The MSP should offer planned and on-call break/fix services, including emergency response to server issues.
* **Move, Add, Change (MAC)** – [Company Name] is looking for the MSP to help with any changes to the location, configuration of existing equipment or software, and installation of additional equipment or software as needed.
* **Mobile Device Support -** The MSP will need to support, secure, and provision (and ongoing support of that provisioning) of any mobile device into the company network.
* **Reporting** **–** The MSP should provide relevant reporting not only based on their performance from a help desk perspective but also regarding system health, uptime, and assist in keeping an accurate hardware inventory to inform ongoing planning of maintenance, warranties, and refresh schedules.
* **Account Management** **–** The MSP must offer an internal escalation process in tandem with [Company Name] to ensure the ability to have multiple points of contact available if needed; depending on the items or issues encountered.
* **Project Management** **–** The MSP should be able to offer project management and technical engineering resources to assist with technical projects as identified by the MSP or [Company Name] if [Company Name] is unable to provide a Project Manager
* **Solution Design** – The MSP, at the request [Company Name], must provide solution packages (e.g., hardware, software, licensing) and associated consolidation of data.
* **Service Levels –** The MSP should identify service level agreements or objectives and report back on a regular basis to [Company Name] on their ability to meet these agreements or objectives.
* **Hosting -** The MSP may offer services relative to hosting or co-location of equipment, either directly or through partners. ([Company Name] currently hosts servers for our XXX software, XXX and ancillary services, XXX portal, and print server on site.)
* **Onboarding and Offboarding Staff -** The MSP must have processes and procedures in place to onboard and offboard team members in a timely and efficient manner.
* **Compliance – T**he MSP should also support rules and regulations as provided by relevant governing organizations as identified by regulatory or grant based requirements.
* **Scalability –** The MSP must be able to offer a model where scaling up or down from a systems and cost perspective is simple and nimble.
* **Multi-Factor Authentication (MFA) –** MSP must be able to manage a Multi-Factor Authentication (MFA) solution to provide an easy-to-use method to verify user identities at login and to protect logins with multi-factor authentication.
* **Vulnerability Testing -** The MSP should offer, as a service or through a partner, vulnerability tests, both internally and externally, to determine what flaws and potential threats exist from the outside, or perimeter, of [Company Name]’s business network.
* **Commercial Software Support –** The MSP should offer support for the following Commercial Software, which is beyond the standard Windows Operating System, and Microsoft Office 365 Products, Adobe, Dexis, NextGen, Proofpoint, Forticlient, Integrisign, Rosetta/IMMPACT, Quickbooks, Andar, SecureLink, Tracks, Multiview, Relias, ODBC, Extreme Networks, Meraki, Fortinet, Cisco, VOIP Phones, Ricoh and Kyosera printer/scanners.

### 4. Response Process

#### 4.1 Notification of Intent to Respond and Clarifying Questions

Please indicate your intention to respond to this RFP by email to the Primary RFP Contact listed below by the *Intent to Respond and Questions Due* date outlined 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.

All questions from all respondents will be answered by no later than the earlier of one week of date of receipt or one week prior to the RFP response deadline.

#### 4.2 Primary RFP Contact

Please direct all inquiries regarding to this RFP to:

**[Representative’s Name]**

**[Representative’s Title]**

**[Company Name]**

**[Representative’s Email]**

Any response received after the delivery date specified, will not be considered without prior written or electronic approval.

Please complete the attached forms (Attachment A and Attachment B), a proposal document, pricing breakdown, and a version of any master services agreement or other contract that would be utilized if chosen.

### 5. Selection Criteria & Process

#### 5.1 Selection Criteria

[Company Name] will evaluate the responses based on multiple criteria and will select the best overall solution to fit its needs. [Company Name] is not obligated to select the lowest price bidder. All responses will be evaluated in the following areas:

* Completeness of solution
* Expertise and experience
* Demonstrated customer service quality and support
* Previous relevant experience, including with [industry specific organizations]
* Vendor strength and stability
* Account management
* Reporting capabilities
* Cost

#### 5.2 Selection Process

All responses will be evaluated as received and included in the following process:

* Review and scoring of the responses, as well as clarification of information as deemed necessary by the evaluation team.
* Identification of 2 or more final candidates to conduct in-depth review of capabilities, including on-site or virtual interviews and presentations.
* Conducting of site visits and/or reference calls as deemed appropriate by the evaluation team.

### 6. Key Dates

Below is a general timeline outlining the process steps with estimated dates for each step of the process. By participating in the RFP process, MSPs agree that they can adhere to the following general timeline and the meeting times they reserve through this process.

|  |  |
| --- | --- |
| **Task** | **Completion Date** |
| RFP Distributed to MSPs | Month DD, YYYY |
| Intent to Respond & Questions Due from MSPs | Month DD, YYYY |
| Responses Due from MSPs | Month DD, YYYY |
| Response Analysis / Finalists Selection | Month DD, YYYY |
| MSP Selection / Award Contract | Month DD, YYYY |
| MSP “Go Live” – Begin Rollout | Month DD, YYYY |

### *Thank You*

[Company Name] looks forward to reviewing your response and would like to thank you in advance for your participation. The Managed Service Provider selection project is very important to our continued success and represents a major focus of effort for [Company Name]. We appreciate and value your input, expertise, and feedback.

# Attachment A

RFP Response Form: Corporate Information

Please provide the following information about your company.

|  |  |  |
| --- | --- | --- |
| **1.0 Company Profile** | | |
| **1.1** | Company Name |  |
| **1.2** | Company Address |  |
| **1.3** | Contact Information (Party responsible for responding to this RFP) |  |
| **1.4** | Company Webpage |  |
| **1.5** | Main Products / Services |  |
| **1.6** | Main Market / Customers |  |
| **1.7** | Number of years in the Market |  |
| **1.8** | When did you first start providing similar solutions? |  |
| **1.9** | Company location(s) |  |
| **1.10** | Number of Employees |  |
| **1.11** | Number of Employees in Account Management |  |
| **1.12** | Number of Employees in Technical Support |  |
| **1.13** | Notable Acquisitions |  |
| **1.14** | Key Business Partnerships |  |

|  |  |  |
| --- | --- | --- |
| **2.0 Financial Information** | | |
| **2.1** | Previous year gross revenue |  |
| **2.2** | Previous year net income |  |
| **2.3** | Return on investment |  |

# Attachment B

RFP Response Form: Questions

Please provide responses to the questions below to the best of your ability.

|  |  |
| --- | --- |
| **1.0 General** | |
| **1.1** | **Q. What are the general types of organizations your clients represent?** |
| A. |
| **1.2** | **Q. Why do you believe that you are a good fit with our organization?** |
| A. |
| **1.3** | **Q. Describe your onboarding/implementation process and approach if you were selected?** |
| A. |
| **1.4** | **Q. Do you conduct QBRs and what is the nature of those meetings?** |
| A. |
| **1.5** | **Q. How do you typically work with IT Management at clients who have staff members?** |
| A. |
| **1.6** | **Q. What do you feel your overall strengths and differentiators are?** |
| A. |
| **1.7** | **Q. Do you serve clients with 24 X 7 requirements?** |
| A. |
| **1.8** | **Q. What services do you offer besides the core services of a Managed Service Provider?** |
| A. |
| **1.9** | **Q. What type of training do you offer either during onboarding or ongoing?** |
| A. |
| **1.10** | **Q. What do you feel are your biggest hurdles to a successful relationship?** |
| A. |
| **1.11** | **Q. What training resources are available for team members?** |
| A. |
| **1.12** | **Q. What type of general expertise can you provide in key technology areas?** |
| A. |
| **1.13** | **Q. What differentiates your organization from your competitors in the marketplace?** |
| A. |
| **1.14** | **Q. What experience and expertise do you have in serving [industry specific organizations], including but not limited to [niche examples]?** |
| A. |

|  |  |
| --- | --- |
| **2.0 Processes** | |
| **2.1** | **Q. Do you use in-house or contracted resources for services?** |
| A. |
| **2.2** | **Q. Describe your process for migrating [Company Name] to your organization?** |
| A. |
| **2.3** | **Q. What [Company Name] resources would you require (i.e., information, data, staff resources, communication) during initial migration and on an ongoing basis?** |
| A. |
| **2.4** | **Q. Outline the methods by which clients can access you (i.e., online, by phone, etc.).** |
| A. |
| **2.5** | **Q. Describe the escalation and account management process.** |
| A. |
| **2.6** | **Q. Where is/are your support center(s) located?** |
| A. |
| **2.7** | **Q. How involved is your team with creating project plans/testing during technical projects?** |
| A. |
| **2.8** | **Q. Do you follow ITIL or other processes aligned with industry standard practices?** |
| A. |
| **2.9** | **Q. Do you participate in drills or tests i.e., DR, IRP, etc.?** |
| A. |
| **2.10** | **Q. How do you notify users of maintenance windows or system outages?** |
| A. |
| **2.11** | **Q. What types of diagrams would you typically create/maintain?** |
| A. |
| **2.12** | **Q. Do you offer knowledge bases for common issues and how are they utilized?** |
| A. |
| **2.13** | **Q. What is your willingness or ability to support the security systems, phone systems, audio/visual systems?** |
| A. |
| **2.14** | **Q. How often do you conduct DR testing?** |
| A. |

|  |  |
| --- | --- |
| **3.0 Technology** | |
| **3.1** | **Q. What types of monitoring agents would you use for end user devices?** |
| A. |
| **3.2** | **Q. What is the back-end help desk system you use?** |
| A. |
| **3.3** | **Q. Do you offer managed firewalls or other managed technology?** |
| A. |
| **3.4** | **Q. Do you offer MDM or other mobile management technology?** |
| A. |
| **3.5** | **Q. Do you offer a EDR/MDR or other security-based technology?** |
| A. |
| **3.6** | **Q. Do you offer a SIEM or other security-based technology?** |
| A. |
| **3.7** | **Q. Do you have tools to provide system uptime metrics?** |
| A. |
| **3.8** | **Q. What tools do you use for network monitoring?** |
| A. |
| **3.9** | **Q. What tools do you use for system monitoring or general health level of end user devices?** |
| A. |
| **3.10** | **Q. Do you offer or partner for laptop encryption?** |
| A. |
| **3.11** | **Q. If hosting/co-location is an option please describe details of option i.e., services, vendor partners, etc.** |
| A. |

|  |  |
| --- | --- |
| **4.0 Support** | |
| **4.1** | **Q. 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.** |
| A. |
| **4.2** | **Q. Do you allow customer’s access to their instance of the ITSM system? If so, how much access?** |
| A. |
| **4.3** | **Q. Please provide details on your standard reporting capabilities.** |
| A. |
| **4.4** | **Q. Describe any documentation and support (e.g., user manuals, online help, interactive dem web-based seminars, and online knowledge base) that will be available, both from the techn perspective and the end user perspective.** |
| A. |
| **4.5** | **Q. What options are available for user training and technical training that may be required by staff?** |
| A. |
| **4.6** | **Q. Describe any user groups, websites, newsletters, conferences, or any other means you support for sharing information and soliciting service feedback.** |
| A. |
| **4.7** | **Q. How do you monitor customer satisfaction and quality assurance on an ongoing basis and how might we benefit from this process?** |
| A. |
| **4.8** | **Q. The COMPANY 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.** |
| A. |

**i**

|  |  |
| --- | --- |
| **5.0 Pricing & Contracts** | |
| **5.1** | **Please attach cost estimates and worksheets to support these estimates if applicable. Itemize non-recurring and recurring costs. Recurring costs should be quoted as per user per month costs. Other pricing models may be provided as an option.** |
| **5.2** | **Please attach a Master Services Agreement or other legal documents beyond a proposal which accompany a proposal.** |

|  |  |  |
| --- | --- | --- |
| **6.0 Requirement from Section 3** | | **Detailed Answers to Requirements** |
| **6.1** | **Help Desk Support** |  |
| **6.2** | **Server and Network System Monitoring** |  |
| **6.3** | **Patch Management Services & Preventative Maintenance** |  |
| **6.4** | **Business Continuity and Disaster Recovery** |  |
| **6.5** | **Remote Backup** |  |
| **6.6** | **Antivirus, AntiSpam & AntiSpyWare Protection** |  |
| **6.7** | **On-Site Support** |  |
| **6.8** | **Networking Support** |  |
| **6.9** | **Security System Monitoring** |  |
| **6.10** | **Warranty and Asset Inventory**  **Management** |  |
| **6.11** | **Software Licensing Control** |  |
| **6.12** | **Procurement Management** |  |
| **6.13** | **PC Deployment** |  |
| **6.14** | **Desktop and Laptop Support** |  |
| **6.15** | **Printer, Copiers and Scanners** |  |
| **6.16** | **Desktop Software Standardization** |  |
| **6.17** | **Lifecycle Management of Hardware Units** |  |
| **6.18** | **Break Fixes and Installation** |  |
| **6.19** | **Move, Add, Change (MAC)** |  |
| **6.20** | **Mobile Device Support** |  |
| **6.21** | **Reporting** |  |
| **6.22** | **Account Management** |  |
| **6.23** | **Project Management** |  |
| **6.24** | **Solution Design** |  |
| **6.25** | **Service Levels** |  |
| **6.26** | **Hosting** |  |
| **6.27** | **Onboarding and Offboarding Staff** |  |
| **6.28** | **Compliance** |  |
| **6.29** | **Phone/VM Systems Management** |  |
| **6.30** | **Commercial Software Support** |  |

|  |  |
| --- | --- |
| **7.0 References** | |
| **7.1** | **Please provide at least three references for customers with similar operations to the proposed solution. Include contact names, phone numbers, email addresses and industry.** |
| **7.2** | **Please provide three references of customers that have left you’re your company in the last year. Include contact names, phone numbers, email addresses and industry.** |

**Please provide any other information you feel should be considered in our evaluation.**