

Request for   
Proposal Template

# Before we Begin…

About this Template

The right Request for Proposal (RFP) is invaluable in finding the most appropriate IT partner for your business. Not only does it succinctly express your technical setup and requirements, it allows MSPs to review them, evaluate them and approach you with more relevant solutions – streamlining the selection process.

This template follows a standard RFP setup, emphasising what you need both from your technical solutions, and from a successful tender application. All you need to do is fill in the appropriate details where designated by the parentheses [ ], or as otherwise indicated by the instructional text.

Do not be afraid to add, remove or amend any of the text provided either; we understand every business is different, and while this RFP is deliberately structured it is also entirely flexible.

Most importantly, be sure to delete any instructional and placeholder text before submitting this document – as well as this introductory page. Throughout this document, instructional text is indicated by the use of italics

Finally, we wish you the best of luck in finding the perfect IT Partner. As a provider of enterprise-level solutions across multiple sectors and industries, we know how important the correct IT support can be.

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# 1. 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.*

*Introduce your company, your requirements and your expectations of an MSP. This doesn’t need to be in-depth, you need only state your broad business requirements and minimum security & compliance standards.*

*While you may have already identified a preferred technical solution, resist the temptation to demand it. Doing so may limit your MSP’s solutions, restrict your chances of finding a partner and inadvertently limit your business to sub-optimal solutions.*

EXAMPLE:

For your consideration, [COMPANY NAME] submits this Request for Proposal (RFP). The request is for a single Managed Service Provider, or equivalent IT specialist, to provide a Managed IT Service to [COMPANY NAME] commencing [INSERT DATE]. We seek an ongoing Managed IT Service which can deliver on the specified technical requirements to the level of cyber security and regulatory responsibilities designated.

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## 2. An Introduction to [COMPANY NAME]

*Introduce your company, its people and its proud business achievements. You and your MSP want a long-lasting, valuable business relationship, and some insight into your company culture goes a long way to finding like-minded partners. Demonstrate value, be unique and share your company voice; it’s an effective ice-breaker for MSPs who share your ethics and aspirations.*

*In this example, we’re introducing our (fictional) recruitment sector business.*

EXAMPLE:

We are [COMPANY NAME] – the award-winning, MRS-accredited recruitment specialists. We’re in the business of connecting people: bringing new talent to established enterprises, skilled professionals to brand new ventures, and business owners to the freshest minds in their sector.

While specialising in IT, Marketing and Sales Recruitment, we’ve also helped millions of applicants find their future across a range of business sectors.

Our people-first approach ensures applicants and employers find the perfect match, and forge exciting new careers that last.

[COMPANY NAME] Facts

* Located in Long Lane, London
* Founded in 1994, with a team of 1,000s across 175 UK branches
* Winners of various industry awards including…
* MRS and RES accredited
* Certified in…

## 3. Business Requirements

*As with your Technical Specifications section, no detail is too minor here. Outline anything and everything you want from your Managed Service Provider, as you need them to provide your every IT need now and for the future. This can be anything from complex hardware maintenance to the renewal and license management of your SaaS Solutions.*

*The list below is entirely for example purposes and is neither exhaustive nor inflexible; your Business Requirements are yours to demand.*

Our Priority service requirements include:

Business Efficiency

* Reduced monthly operational costs
* Competitive advantage locally or within specific verticals
* Improving accountability
* Technical capability for extended operating hours
* Streamlining business processes and eliminating manual tasks
* Stability of all IT systems
* Improved implementation of the Digital Customer Experience

### Technical Support

* Full and equally-enabled technical support for on-premise and remote workers via help desks, co-managed support and ongoing technical coverage over multiple channels.
* Capacity for installs, moves and modifications across existing equipment and all supporting software and hardware.
* Monthly Invoicing and Reporting covering purchases, product updates and recurring billing (SaaS solutions, etc.)
* Installation, activation and integration for all new software and solutions
* A managed IT policy adhering to the demands and regulatory compliances of the business.
* Regularly scheduled consultancy on existing and future technical solutions
* Automatic renewal of all software and associated documentation
* Support and compliance with all GDPR procedures
* Support for integrating SaaS services with all new and existing hardware and software
* Warranty covering breaks and fixes, as well as emergency responses via On-Site Technicians
* Lifecycle management of all devices, up to and including end-of-life
* Planning and assistance on deployment procedures
* All relevant software installed, tested and activated
* A Technology Strategy, developed in collaboration with [COMPANY NAME] staff to implement new technologies and solutions and drive ongoing digital transformation
* Co-managed IT, with the ability to source technicians, mechanics and other IT assistants on an ad-hoc and on-prem basis.

### Security

* Preliminary and ongoing security training for staff members
* Implementation of spam filtering and email scanning
* Firewall protection
* Implementation of a Zero-Trust security policy and associated cyber security mesh
* Email Security and Spam Filtering

### Backup and Disaster Recovery

* Incremental remote backup of all necessary operations
* Backup of (and to) company Cloud resources

### Connectivity and Telephony

* Implementation / support for a hosted telephony service
* Implementation of a Cloud-manageable mobile VoIP solution
* Secure, high-speed MPLS internet service

## 4. Technical Specifications

*Detail your company’s IT infrastructure. No information is too minor: share servers, operating systems, networking devices, Cloud solutions, anything that’s safe to divulge and serves to inform your prospective provider.*

*It is also valuable to share your current business aspirations and challenges; doing so might inspire some possible solutions or suggestions from your prospective provider, and help to ensure these solutions don’t conflict with your technologies or business goals.*

*Again, we will be referring to our fictional recruitment business for this example.*

EXAMPLE:

Our purpose at [COMPANY NAME] is to introduce fresh new minds to successful business leaders with an eye for talent. As a people-centric business, we need to ensure that everyone relying on our services has the best personal security, full communicative control and rapid applicant processing in the fast-moving world of recruitment.

The majority of our work is done within Office 365. While our recruiters are beholden to the Microsoft Windows operating system for compliance and continuity purposes, our small graphic design department is free to use either Apple Macintosh or Windows devices as per personal preference. However, we do not currently allow a BYOD policy.

We are reliant on a hybrid Cloud solutions and SaaS services, and depend on on-prem hardware as well as our Cloud technologies. Our attention has recently turned to our data backup, Cloud security and SaaS software availability however, as the demand for remote working has begun to strain all three.

Technical Specifications:

*Provide details for all of the following, plus any other technical solutions you deem relevant*

Servers –

Internet Provider –

Operating Systems –

Workforce Size (Including on and off-prem workers)

Firewall –

Security –

Endpoint Protection –

SaaS Solutions –

Backup –

Standardised Software –

Considerations

*Provide special considerations relating to your premises or unique business circumstances. The list below is by no means exhaustive, but does represent some potentially overlooked operational complications. Again, this list is for demonstration purposes only, and yours may differ significantly.*

* *[Consider your premises; is your building a high-rise, a listed property, or a space shared with other businesses?]*
* *[Are there any special use cases across your IT environment, for example among admins or office managers?]*
* *[Are any IT improvements likely to conflict with your ongoing or upcoming developments?]*
* *[How do remote users connect securely to your network?]*
* *[Are you relying on any current providers and if so, what is the extent of their services?]*

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## 5. Selection Criteria

*Here, you’ll prioritize your MSP’s credentials. You may want a partner who is especially familiar with the recruitment or education sector, or has a provable track record in customer satisfaction. It’s useful to rate these priorities on a percentage scale, allowing prospective bidders to submit based on their strengths and experience.*

*Once again, your criteria may differ from the examples provided, so feel free to treat the form below as flexible.*

The following criteria indicates our selection process for the successful bidder. When presenting a tender, prospective partners are encouraged to demonstrate these credentials in their answers and examples.

|  |  |
| --- | --- |
| Criteria Examples | Importance |
| Experience in delivering Managed IT solutions | ?% |
| Dedication to ongoing customer service and support | ?% |
| High client retention rates | ?% |
| Industry experience (over time or by of customers served) | ?% |
| Accounting and Financial Viability | ?% |
| Proven resilience in Cyber Security | ?% |
| Previous experience with similar or relevant proposals | ?% |
| Stable business relations with partners, providers & distributors | ?% |
| Account management | ?% |
| Auditing and analytical capabilities | ?% |
| Anything else… | ?% |

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## 6. Information Requirements

*In this multi-tiered section, you’ll provide a more granular overview of your company requirements. Be sure to ask questions that require detailed and persuasive answers, not binary ‘Yes’ or ‘No’ responses; this way, you encourage your prospects to demonstrate their credentials. In this section, it’ll be your prospective partner providing the answers.*

The following questions will help us identify your strengths and experience in the industry. Please reference each question in the response and feel free to elaborate on any answers as you see necessary.

6-A: Company Information

*These questions help support your final choice and let your prospects present themselves in confidence. This is an excellent opportunity to nurture trust with any prospective partners.*

* Please share your industry and current business turnover.
* What skills, experience or past achievements demonstrate your ability to meet the demands outlined in this RFP?
* Considering the requirements outlined by [COMPANY NAME], please provide details of comparable operations, including outcomes and feedback and referees where possible.
* What is your current employee count? How are these roles divided across your services?
* Please provide a skills matrix for the team who will support our request.
* What are your industry or partner accreditations?
* Have you achieved any service standard certifications?
* What are the costs and methods involved when migrating users from on-prem solutions to Cloud services or solutions?
* How is your company’s ownership divided?
* What are your company culture and values?

## 6-B Your Proposal

*Allow your prospect to demonstrate their approach to your proposal. This provides insight into the way both you and your prospects operate and goes one step further to determining your compatibility as business partners.*

* What information, if any, will you require from [COMPANY NAME] when undertaking the proposed request?
* How will your technical solutions adhere to the unique specifications and current technical setup of [COMPANY NAME]?
* Please outline the installation, implementation and ongoing support of your proposed services, with particular attention to their long-term benefits.
* What is your company’s onboarding process?
* Provide an example of how your approach to a previous client challenge elevated their technical and business capabilities.
* Describe how you effectively balance your pricing against emerging and evolving technologies.
* Do you foresee any complications in delivering your proposed solution? If so, what is your proposed contingency plan?
* Please provide examples of your experience or accreditations in the following fields:
* Security training for teams and individuals
* Ongoing cyber security provisions for long-term partners
* Implementation of security systems including Firewalls, SaaS protection, Two-Step Verification, Phishing Training, Zero-Trust or any other pertinent security solutions
* Data Backup
* Disaster Recovery in the instances of security breaches, malware, property damage and technical complications
* Implementation of VoIP and other telephony services
* Maintaining reliability connectivity in offices of 20 people or more

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## 6-C: Support Functions

*Let your prospective partner demonstrate its service approach. An MSP should be willing and able to provide service statistics and demonstrate an ability to fulfil its service level agreements.*

* What is your standard procedure for raising and responding to service ticket requests?
* How do you tailor your solutions to support remote workers or those with atypical technical capabilities?
* What is your support staff volume, and how do you distribute its members across each support channel?
* What are your average response and waiting times when resolving a support ticket?
* What training options exist for the staff of clients, and how are these effectively delivered?
* How do you measure customer satisfaction, and how does this influence your service statistics?
* Do you provide Third Party Vendor Management?

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## 6-D Pricing Schemes

*You want an MSP that can demonstrate its financial benefits. While by no means conclusive, a financial template at least allows MSPs to make projected monthly and yearly costs across numerous services and help you better budget for the future.*

Using the following suggested format, please outline the projected cost of each service and any recurring costs, based on [COMPANY NAME]’s size, specifications and requirements. Please add any further criteria as necessary.

Where possible, please provide details of any consolidative services you can offer based on our requirements, as well as a Project Rate card.

## Monthly Cost

|  |  |
| --- | --- |
| Service | Net Cost |
| Helpdesk and Remote Support | £ |
| Server Maintenance | £ |
| Network Security | £ |
| Monthly Invoice Value | £ |
| Backup and Recovery | £ |
| Any other Items | £ |

## Annual Cost (Incl. VAT)

|  |  |
| --- | --- |
| Timeline | Cost |
| Year One | £ |
| Year Two | £ |
| Year Three | £ |
| Total | £ |

## 7. Correspondence

*Designate a point-of-contact for all applicants, and provide their contact details*

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

|  |  |  |
| --- | --- | --- |
| Name | Email | Telephone |
| First & Last Name | name@domain.com | 01234 567890 |

## 8. Key Response Dates

*Provide a timeline chronicling key dates in the proposal journey; this helps you and your prospects keep track and culpability over the tender process.*

As of the date of this Request for Proposal, documented as (DD/MM/YYYY), we await the following key responses on the dates outlined below. Please ensure that all documents are submitted in electronic format and to the email address provided.

|  |  |
| --- | --- |
| Key Responses | Deadline |
| Intend 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

*The closing terms and conditions protect you from any conflicts or confusion that may result in legal or operational complications. These are by no means conclusive and, as per your sector or requirements, can be elaborated upon for purposes of compliance or culpability.*

9-A: The submittal of any proposal is no guarantee or approval of any contract, nor does it oblige [COMPANY NAME] to enter into any agreements with the bidder, in relation to the proposal or otherwise.

9-B: This document is designed only for potential partners of [COMPANY NAME] and the sharing, distribution or disclosure to any other persons, enterprises or third parties may constitute a breach of data compliance regulations including, but not limited to, EU GDPR legislations.