# Introduction

Searching for the right IT managed services provider can be a complex and intimidating process. Requests for Proposals (RFPs) are a great tool to help organizations evaluate IT providers, streamline the selection process, and ultimately find the best technology partner to help their organization to thrive.

When an RFP is not well written, the responses can be too vague for your unique organizational needs, which can result in choosing the wrong partner for the job, in addition to lack of clarity on actual scope of work, inaccurate pricing, and more.

Our IT MSP request for proposal template draws on our own experience as an IT MSP provider and as a contractor for large government and private-sector projects.  We show you how to structure your RFP, what questions to ask to make the best-informed decision, and what you need to tell potential providers about your business to make sure you get what you need.

**Use our template below to take stock of where you are and where you want to go.**

And then use it to find the IT MSP provider who can get you there.

***\*\*Note:*** *Read descriptions of sections below first,* ***actual fillable template follows.***

Cover Page:Cover pages provide core information including your company name and logo, a title for your Request for Proposal (RFP), and important dates such as Release Date and Due Date. The cover page invites your bidder to review what you’re asking for and provide key information on page one without being overwhelming.

Background:Many people skip right over the background section when first reviewing an RFP, it’s true. The instructions to respond and the scope are most important to a firm when deciding to bid or not to bid. However, a good background section is critical to receiving a responsive RFP that has a true understanding of your goals and needs if you present them.

The background section should provide a 1-2 paragraph summary of your organization including:

* Description of your market
* What services or products you offer
* A brief history
* Size
* Organizational structure
* Objectives and goals of the RFP

This gives context how your IT Department supports your greater mission and organizational goals.

Objectives and goals of the RFP: This section should tell the bidder what your need is for IT managed services whether you have outgrown your internal IT capacity, or you’ve been doing this for ages and want to see what other vendors have to offer. This should tell your bidder why now and what problems you are facing. Be sure to include your pain points! What is working well, and you want to maintain? What isn’t working well and you’re trying to improve through this procurement? Some organizations are embarrassed and hold these close, while others might deem these details unimportant like sharing personal details with a stranger. However, being honest about your needs with your potential new IT managed services partner will help them customize a solution to you – and if they don’t, they’re not the right vendor for you.

Scope of Services: The needs of an organization may vary by size and industry, but there are core services that most IT managed services partners should be able to offer. Our IT MSP RFP template includes a comprehensive, but curated list of service areas you may want from your new vendor. This section should be edited and rightsized to fit your business, but hopefully we have taken the guess work out of it.

This section also plays a critical role in your bidder response. Many RFP templates will request a bidder respond with an approach to a scope of services and then have an exhaustive list of questions in addition to the narrative. This set up leaves both the bidder and the reviewer with more work than either intended and confused. The bidder often feels like they have already covered the topic in their narrative, or undercovers to expand in the question because they do not want to sound repetitive. The reviewer then has to compare the two sections during evaluation to make sure they say the same thing or wonder which answers they should value more. This confusion and concern can be avoided by setting up your scope to mirror the response you want to evaluate.

Response Instructions: As mentioned above, this is should be the first section your bidders are looking at. You will want to include information including:

* *Submitting questions –* Will there be a deadline to submit questions, or will you take them on a rolling basis? Will you be publishing answers to questions for all bidders? (Note – It is a best practice to share ALL questions and answers). Who is the contact for submitting questions?
* *Date and time of a bidder conference (optional) –* We highly recommend holding a bidders’ conference to discuss complicated technical aspects of your environment or to ask more questions about your background and current situation. This allows you to engage with potential bidders and understand what it would be like to work with them, as well as understand information you might have under covered in your RFP.
* *Submission Instructions* – How will you accept proposals? Should it be emailed and to whom? Do you want a single file or multiple files, such as cost and technical narrative separate? What file formats are you accepting? Do you want the bidder to send hard copies to a physical address? (Note – Hard copies are not preferred by industry, as it cuts into preparation time and the need to account for mail or in-person logistics)
* *Presentations* – We highly recommend a “down select” phase where you meet with proposers who submit the most compelling proposals. Depending on how many submissions are received and the size of your project, three to five bidders in Round 2 tend to be the right amount. This presentation gives the bidder time to tell you about their differentiators, give you a feel what how you would interact, and ask questions about technical or cost items where you would like elaboration.
* *Vendor Selection­ ­*–It is a good idea to let a vendor know when a project would be starting so that they can adequately plan for resources to support your project.

Proposal Format for Bidder:This is the next most important section for your bidder as it provides instructions on critical elements to include in their bid for your review. You will also want to include any specific formatting requests, such as Times New Roman font (we prefer to be font agnostic), single or double spacing, or any other considerations. For the most part, we recommend allowing the bidder to submit their materials in a format they believe is best, and you can use clarity and aesthetic as another consideration in your evaluation.

* Cover Letter *–* Typically no more than a page. This section should demonstrate understanding of the scope of work and include a point of contact for the proposal.
* Firm Overview *–* This section should include a brief description and history of the company. Bidders should specifically address the products and services they offer narrowly tailored to address the scope of work. If the client needs specific information for their records or processes, such as primary place of business, Tax Identification Number (TIN), or status (small business, large business, minority owned business) or other administrative information, this would be the best section to address such items.
* Team– This section should provide names and qualifications of individuals assigned to your project. In technology services, the team is one of the most critical differentiators for services. Because of the nature of the work, you should consider that you are buying the knowledge and skills of the team working with you. We recommend asking for “short bios” or “qualifications” of the team members as opposed to full resumes. This allows the bidder to highlight the most important information about the individuals without you collecting excess pages for review.
* Technical Approach – This is the most important section, and often the most confusing section for bidders to respond to. In this section, you want bidders to respond clearly, specifically, and concisely to how they would accomplish the Scope of Services you described at the beginning of your RFP document. If you decide to include any additional questions for the bidder to respond to, you should instruct them to put those responses in the Technical Approach section. You should also make sure those questions logically align to areas of the Scope.
* Management Approach – This section also tends to be confusing for bidders because technology services are not managed like other types of projects that use contractors. This section should include specific sub-sections related to how the bidder manages their people and interacts with you as the client. We recommend the following: Description of controls in place to manage staff and activities, service level agreements including support hours (24/7, weekday business), risk management, and issue escalation. A topic growing in popularity is also client/business interaction – the client should decide when going to RFP, do we want a vendor that provides us tech services or a vendor that has devoted time to discussing IT strategy with our managers? This is a personal business choice that should point you to a specific type of vendor.
* Experience and References – Rule of thumb is to have your vendors submit three references similar in size, scope, and complexity that are on-going with at least a year of performance or completed within the past three years. You will want to request contact information (point of contact, title, email, and phone) to check those references if you like a vendor’s proposal.
* Cost – IT managed services should be a fixed fee monthly or annual cost. If this detail is desired, you can ask the vendor to break it out by components of service associated with the scope. Due to the type of work, it is not recommended to ask for rates by position, as these usually tend to be blended rates and difficult to extrapolate as the bidder cost models consider holistic service. Clients should not be concerned about details in the cost proposal to give them the best rates or “hiding fees” because your bidders are very conscious of their competitors on the market. Essentially, they have an idea of what they need to offer you to be cost competitive. Rather than asking for additional details in the cost proposal that make little sense to you or the bidder, it would be better to ask bidders directly about their costs in an interview following proposal submission.

Evaluation Criteria: This section of the proposal will tell the bidder how the proposal will be evaluated. Are you going to take strictly the lowest price, or will you be looking at which bidder provides the best cost value to you when accounting for services scope, experience, and price? We always recommend stating that you will choose the bidder that provides the best value so that you can prioritize what proposal items are most important to you. In some instances, you may want to add “weighting” or points to different sections. In general, technical approach is usually most important, followed by experience or cost. You will want to make sure you give weight to all elements of your proposal, but not necessarily each section.

Appendix A – Technical Environment:This section will provide your bidders with a clear understanding of your technical environment including users, locations, devices, and network information.

Appendix B – Additional Questions:Additional questions can be confusing for bidder or provide insight into client true pain points. Bidders often feel like they are repeating something already discussed in the technical approach or content might be missing from one place or the other. Avoid the questions method by having a well written scope to address in the technical narrative.

If questions cannot be avoided, request as an attachment or as a section in the technical narrative. Do not leave your bidder guessing on where to help you find information. When developing these questions, ask yourself why they do not fit in your background or scope of services sections. Bidders often have to guess at the reason for the question and throw lots of information on how to address problems the client is having without knowing the “root cause.” The bidders will be able to address the causes of your problems, not just the symptoms; however, simply asking a laundry list of questions may not showcase their ability to diagnose and solve the problem. For this reason, we highly recommend the post proposal presentations and giving bidders scenarios to answer, where they can interact with you to gather information and solve the hypothetical problem.

Appendix C – Contract Clauses:Unless your entity has a strong legal framework to work in, it is usually easiest to have the IT managed services provider give you their terms and conditions on their own paper. If you ask for these at the proposal stage, it will save you time by preparing for legal review in advance. If there are any initial red flags, there is an opportunity to discuss those clauses with your down selected bidders during presentations.

***\*\*Template starts here\*\****

***Build out referencing corresponding sections above as necessary.***

***Questions within suggestions below are also there to help prompt your writing.***

Cover Page

Client Logo

Title of RFP

POC Information

# Background

## About [Company]

How long have you been in business? What markets do you serve? What are your primary services or products? Where are you located? How large is your business? – How many employees do you have? What is your annual revenue?

## Objectives and Goals

Why are you putting out this RFP? – What has changed that you are moving from internal to managed services? Why are you looking for a new provide? Why is this the right time to be putting out this RFP? What are you pain points? What aspects of IT is your company struggling with?

# Scope of Service

## Technical Requirements

What is the scope of service for your RFP? Will it be all technology services for your organization or only a selection where your IT staff is currently lacking skills and expertise? Every project is unique and customized to the firm’s needs, but we recommend the following buckets for consideration. You should articulate the current state and type of service you need for each bucket.

\*\*If you would like further guidance on building out the Technical and Management sections below, please contact us. We can help!

Technical

* Network Infrastructure
* Server Infrastructure
* Security
* Backup Management
* Business and Strategic Planning
* Project Management
* Products
* Help Desk
* Applications
* Asset Management

Management

* Project controls
* SLAs
* Risk management
* Issue escalation
* Client/vendor interaction and communication

# Response Instructions

|  |  |
| --- | --- |
| **Event** | **Date** |
| RFP Release Date |  |
| Bidder Conference |  |
| Questions Due |  |
| Answers to Questions Posted |  |
| Proposals Due |  |
| Presentations |  |
| Vendor Selection |  |

## Bidder Conference

What date and time will this take place? Is it in person or virtual? Be sure to include the address or link. Is advance registration required? Will you post the attendee list? – If yes, you need to collect information by registration form and intent to respond email.

## Questions

Who is the point of contact for questions? What is their name and email? Are you providing a template to submit questions?

Give a reasonable amount of time for your team to collect, draft, review, and post answers to questions.

## Proposal Submission

Who is the point of contact? Will it be my email or other methods? What file forms will be accepted? PDF, Word, Excel?

## Presentations

Will there be Interviews/Presentations? Will those bidders be a down selection of proposal submitted?

# Proposal Format

What are the document expectations? 8 ½ x 11, single spaced, 12pt font? Are there page limits?

What order do you want the proposal and what are the required sections?

* Cover Letter
* Firm Overview
* Team
* Technical Approach
* Management Approach
* Experience and References
* Cost

# Evaluation Criteria

How are you going to evaluate? What items are most important? Adjective rating system?

# Appendix A – Technical Environment

* *Locations –* What are the physical locations of your organization? Will the IT services be required for all locations?
* *Users –* How many people work for the organization? What is your organizational structure? How many departments are there? Are there any specific needs of individual departments?
* *Devices –* Are your users operating Macs or PCs? Are there mobile devices (phones, iPads, tablets) that you want included with service? Printers?
* *Internet Service* – What are your internet upload/download speeds? Does it vary by location?
* *Servers and Network –* Where are they located? How many? Are individuals using VPN?
* *Email –* What email service are you using?
* *Applications –* What applications are you currently using and maintain as an organization? Include all desktop software (Microsoft Office, Adobe products), special industry software and applications, monitoring software and applications, data software and applications
* *Cybersecurity –* What is your currently approach to security? Both hardware and software
* *Phone systems –* What is your current phone system? Are you using systems such as VoIP?

# Appendix B – Additional Questions

# Appendix C – Contract Clauses