# Introduction

Searching for the right IT managed services provider can be a complex and intimidating process. Requests for Proposal (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.

But without thoughtful construction of an RFP, the responses submitted can be too vague to discern if they meet your unique organizational needs. This might result in lack of clarity on actual scope of work, inaccurate pricing, or worse: choosing the wrong partner for the job.

Our IT MSP RFP template draws on our own experience as an IT MS 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.**

Then use it to find the IT MS provider who can get you there.

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

Cover Page:The cover page provides core information including your company name and logo, your RFP title, and important timelines such as release date and due date. It serves as an easy way for bidders to review key information on page one, saving more detailed requirements for later pages.

Background:Many people skip right over your background section when first reading an RFP. Response instructions and scope of work are the most important factors to firms deciding whether to bid on a project. However, a good background section is critical for your organization to receive a responsive RFP that has a true understanding of your goals and needs.

The background section should provide a one-to-two 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 on 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. Have you outgrown your internal IT capacity? Have you been using an ITMSP for ages and want to see what other vendors have to offer? In other words, tell your bidders why now and what problems you’re facing. Be sure to include your pain points. What’s working well that you want to maintain? What isn’t working that you’re trying to improve through this procurement? Some organizations deem such details unimportant, while others are embarrassed and rank them alongside 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, 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 guesswork out of it.

A clear scope of services section is perhaps the most critical factor in getting the right bidder responses. Many RFPs request a bidder to respond with an approach to a scope of services and then have an exhaustive list of questions **in an appendix in addition** to the narrative. We don’t recommend this! That setup leaves both the bidder and the reviewer confused, often with more work than either one intended. The bidder feels like they’ve already covered the topic in their narrative and may go off topic because they don’t want to sound repetitive. Comparing the two sections during evaluation, the reviewer wonders which answers they should weight more. **Avoid this confusion and concern by setting up your scope of services section to mirror the response you want to evaluate.**

Response Instructions: This should be the first section your bidders see. You’ll want to include information such as:

* *Submitting questions:* Will there be a deadline to submit questions, or will you take them on a rolling basis? Will you publish answers to questions for all bidders? It’s best practice to share ALL questions and answers a minimum of two weeks before your bids are due to allow bidders to fully incorporate the information into their responses. It can also be helpful to do two rounds of questions so that vendors can clarify any answers they find unclear. List the contact information and process for submitting questions.
* *Date and time of bidder conference (optional):* We highly recommend holding a bidders’ conference to discuss complicated technical aspects of your environment and allow bidders ask more questions about your background and current situation. Engaging with potential bidders brings insight to what it would be like to work with them, as well as fill in gaps that may be missing in either side of the RFP. To increase your quantity of bidders, it can be helpful to hold this meeting online rather than in person.
* *Submission Instructions*: How will you accept proposals (email, portal, etc.)? What is the contact information for the receiver? Do you want a single file or multiple files, such as cost and technical narrative separate? What file formats do you accept? Do you want the bidder to send hard copies to a physical address? (Note: Hard copies are not preferred by the 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 bidders who submit the most compelling proposals. Depending on how many submissions you receive and the size of your project, shoot for three to five bidders in this second round. These presentations allow bidders to describe their differentiators, give you a sense of how they might interact with your team, and present the opportunity to ask technical or other questions.
* *Vendor Selection­:* Let vendors know when a project will start so 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. 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. We find it a best practice to permit bidders to submit their materials the format they believe is best; you can then use clarity and aesthetics as another consideration in your evaluation.

* Cover Letter *–* Typically no more than a page. This section should demonstrate an understanding of the scope of work and include a point of contact for the proposal.
* Firm Overview *–* Ask for a brief description and history of the bidder’s company and for them to specifically address how the products and services will be tailored to fit your requested scope of work. If you need certain information for your records or processes such as primary place of business, tax identification number (TIN), status (small business, large business, minority owned business), or other administrative information, ask for their inclusion here.
* Team– Here, the bidder should provide names and qualifications of individuals responsible for your project. In technology services, the team is one of the most critical differentiators because you’re buying the knowledge and skills of the team working with you. We recommend asking for short bios and qualifications of the team members as opposed to full resumes. This allows the bidder to highlight the most important information about the individuals without providing irrelevant information for you to review.
* Technical Approach – This is the most important section, and often the most confusing section for bidders to respond to. You’re seeking a bidder response that clearly, specifically, and concisely describes how they will accomplish the scope of services listed at the beginning of your RFP document. **If you want bidders to answer any additional questions, instruct them to put those responses in this technical approach section and ensure those questions logically align to areas of the scope of services.**
* 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 subsections related to how the bidder manages their people and interacts with you as the client. We recommend the following:
  + Description of controls in place for staff and activities management
  + Service level agreements (SLAs) including support hours (24/7, weekday business)
  + Risk management
  + Issue escalation
  + Client/business interaction, such as do they provide only tech services or also devote time to discussing IT strategy with managers?
* Experience and References – Rule of thumb is to have your vendors submit three references for jobs similar in size, scope, or complexity that are either ongoing with at least a year of performance or have been 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 monthly fee or annual cost. If you seek more detail, ask the vendor to break it out by components of service associated with the scope. We don’t recommend asking for rates by position as these tend to be blended rates, difficult to extrapolate from bidder cost models of holistic services. Remember that bidders are very conscious of their competitors on the market and 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, you’ll get better information asking them directly about their costs in an interview following proposal submission.
* CostV2 – Managed Services costs will show up in as many different ways as there are bidders. Here are some good rules to follow:
  + Don’t let bidders lump all their costs into single line items with no explanation of detail or cost buildup. Pricing should be clear but detailed in what you are paying for and what you are getting. If it seems too good to be true, it probably is.
  + Some portion of the cost will be for managed services. This is generally a flat fee per month but has a material change cost for users, workstations, servers, network devices, applications, etc that will be trued up either monthly or quarterly.
  + Some portion of the cost is product/licensing, you should clearly be able to identify what products you are paying for, i.e. Backup Solution, Endpoint Protection, Email Security, etc. These costs will change every month based on your consumption of the product.
  + There are always onboarding costs but providers will typically handle them in 3 ways:
    - Fixed Fee Onboarding Cost
    - Hidden onboarding costs baked into the monthly costs for the term of the contract
    - Waived Onboarding Cost
  + There are very often transition costs associated with exiting the current provider. These include:
    - Overlap in services contracts with new and old provider. This is often required because many service providers own various solutions in place like backups, antivirus, email security, networking gear, etc. Seek to understand how much time it will take to remove the old services and implement new services. Many times this can leave a gap in functionality. An overlap in service is helpful here because it gives the new service provider time to deeply learn and understand your needs before blindly proposing a solution that may not be the best fit.
    - Contract Termination Fees often exist when exiting the current provider. Spend time understanding the contract you originally signed looking closely at notification windows, early termination costs, and transition/exit costs.

Evaluation Criteria: This section tells the bidder how your organization will evaluate responses. Are you seeking strictly the lowest price, or looking at which bidder provides the best cost value to you when accounting for services scope, experience, and price? Stating that you’ll choose the bidder providing the best value allows you to prioritize what proposal items are most important. You may want state how the different sections will be weighted. In general, technical approach is usually most important, followed by experience or cost.

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:Avoid much of the need for this section with a well-written scope of services for bidders to address in the technical narrative.

If you get to this section and have developed questions, ask yourself how they might instead fit in your background or scope of services sections. Bidders often must guess at the reason for additional outlying questions and throw lots of information on how to address problems without knowing the root cause. We highly recommend instead having bidders address questions in the technical approach, then using post-proposal presentations to give bidders scenarios to consider where they can interact with you, gather information, and solve a hypothetical problem.

Appendix C – Contract Clauses:Unless your entity has a strong legal framework to work in, it’s 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 saves time by enabling you to prepare for legal review in advance. If there are any initial red flags, there’s 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 (answer from your organization’s perspective)

## 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 provider)? 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 by 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 proposals submitted?

# Proposal Format

What are the document expectations? 8 ½ x 11, single spaced, 10pt font? Are there page limits?

In 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?

# Appendix A – Technical Environment

* *Locations:* Where 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 for 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? Do they vary by location?
* *Servers and Network:* Where are they located? How many? Are any individuals using VPN?
* *Email:* What email service do you currently use?
* *Applications:* What applications do you currently use 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 current approach to security for both hardware and software?
* *Phone systems:* What is your current phone system? Do you use systems such as VoIP?

# Appendix B – Additional Questions

# Appendix C – Contract Clauses