REQUEST FOR PROPOSAL

The following items should be included as the introduction to the RFP questions. (filled out by the client)

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 IT services to (client name)_____

INTRODUCTION

Describe your Business.

PHYSICAL OFFICE LOCATION _____

NUMBER OF SUPPORTED END USERS _____

TECHNICAL ENVIRONMENT

Describe.

SERVERS _____

WORKSTATIONS

- InHouse Staff ____
- Remote Consultants ____
- Shared Workstations ____

NETWORK

- ISP _____
- Firewall _____
- Switch(es) _____
- Power Supply _____
- Wireless Access Point(s) _____
- Wireless network _____
- Virtual Private Network (VPN) _____
- Workstations
  - Laptop _____
  - Desktop _____
- Printers and Scanners _____
- Phone System _____
- Peripherals _____
- Mobile Devices _____
- Multiple Factor authentication (MFA) _____
- Single sign on (SSO) _____
- Virtual Software _____

MANAGED IT SERVICES RFP

(filled out by the client)

FILES AND DATA STORAGE

- Local Drives _____
- Shared Drives _____

SECURITY (SAAS) *(what we currently have)*

- Email Spam/Virus _____
- Firewall _____
- MFA _____
- Endpoint protection _____

DATA BACK-UP *(what we currently have)*

Describe.

EMAIL *(what we currently have)*

Describe.

THIRD PARTY APPLICATIONS *(what we currently have)*

Describe.

END USER TRAINING *(what we currently have vs. what we are looking for)*

- Cyber security training _____
- Phishing training _____
- On boarding training _____

THIRD-PARTY VENDOR RISK ASSESSMENT *(what we currently have vs. what we are looking for)*

Describe.

CYBERSECURITY INSURANCE *(what we currently have)*

Describe.

MANAGED IT SERVICES RFP

(filled out by the client)

IT & SECURITY POLICIES

- Disaster recovery and Business Continuity Plan ○ *Have* ○ *Need*
- Cybersecurity Policy ○ *Have* ○ *Need*
- Acceptable Use Policy (AUP) ○ *Have* ○ *Need*
- Access Request Policy and Procedure ○ *Have* ○ *Need*
- Audit Policy ○ *Have* ○ *Need*
- Computer Room and Physical Security Policy ○ *Have* ○ *Need*
- Email Policy ○ *Have* ○ *Need*
- End User Computing Policy ○ *Have* ○ *Need*
- Information Security Policy ○ *Have* ○ *Need*
- Mobile Employee Endpoint Responsibility Policy ○ *Have* ○ *Need*
- Patch Management Policy and Procedures ○ *Have* ○ *Need*
- Reasonable Risk and Remediation ○ *Have* ○ *Need*
- Remote Access Policy ○ *Have* ○ *Need*
- Risk Assessment Policy ○ *Have* ○ *Need*
- User ID and Password Policy ○ *Have* ○ *Need*
- Vendor and 3rd Party Policy and Procedure ○ *Have* ○ *Need*
- Whistle Blower Policy ○ *Have* ○ *Need*
- Wireless Communication Policy ○ *Have* ○ *Need*
- WISP Document ○ *Have* ○ *Need*
- Workstation Security Policy ○ *Have* ○ *Need*
- Data Backup and Retention Policy ○ *Have* ○ *Need*
- AI Acceptable Use Policy ○ *Have* ○ *Need*

COMPLIANCE & CYBER SECURITY *(what we currently have vs. what we are looking for)*

Describe.

LIST OF OTHER SERVICE REQUIREMENTS

Describe.

RFP RESPONSE PROCESS

- Notification of Intent to Respond _____
- Primary RFP Contact _____
- Response Delivery Instructions _____
- Selection Criteria + Process _____
- FInalist Presentations _____

KEY DATES

SERVICE REQUIREMENTS

As part of this RFP, We have requirements for the following services. (filled out by the client)

- [ ] 24/7/365 Support
- [ ] Help Desk Support
- [ ] Managed SOC - 24x7
- [ ] Access to Industry-Specific Expertise
- [ ] Account Management
- [ ] Antivirus, AntiSpam & Antispyware Protection
- [ ] Automation and Orchestration - AI Automation and Procedures
- [ ] Break Fixes and Installation
- [ ] Business Continuity and Disaster Recovery
- [ ] Change Management
- [ ] Cloud Services Management
- [ ] Collaboration Tools Support
- [ ] Compliance - implementing policies, conducting audits, managing documentation, and providing guidance to maintain regulatory compliance.
- [ ] Custom Application Development
- [ ] Data Analytics and Reporting- Insights into system health, security status, incident response, and performance metrics
- [ ] Desktop Software Standardization and Software Licensing and Upgrades
- [ ] Desktop, Laptop and Mobile Device Support
- [ ] Documentation and Knowledge Management
- [ ] Email System Management
- [ ] End-user Security Awareness Training
- [ ] Expertise in our legal applications
- [ ] Hosting - Microsoft Azure Expertise
- [ ] Identity and Access Management (IAM)
- [ ] Incident Response and Management
- [ ] IT Budgeting and Financial Management
- [ ] IT Policy Review and Development
- [ ] Lifecycle Management of Hardware Units
- [ ] Mobile Device Management (MDM)
- [ ] Monthly Meetings - Scheduled regular IT reviews
- [ ] Multifactor Authentication (MFA)
- [ ] Network Design and Implementation
- [ ] Networking Support
- [ ] Onboarding and Offboarding Staff
- [ ] Patch Management Services & Preventative
- [ ] Maintenance
- [ ] PC Deployment
- [ ] Penetration and Vulnerability Testing
- [ ] Printers, Copiers and Scanner Support
- [ ] Procurement Management
- [ ] Project Management
- [ ] Remote Backup - Hourly, Offsite + onsite, redundant.
- [ ] Security Systems Monitoring
- [ ] Server & Network System Monitoring
- [ ] Service Level Agreement (SLA) Management
- [ ] Software Licensing Control
- [ ] Solution Design
- [ ] Technology Strategy Planning
- [ ] Telephony Support
- [ ] User Experience Management
- [ ] Vendor Management
- [ ] Virtual CISO Services
- [ ] Virtualization Services
- [ ] Warranty and Asset Inventory Management
- [ ] Other specific requirement details:

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 WEB PAGE	
1.5	MAIN PRODUCTS / SERVICES	
1.6	NUMBER OF YEARS IN THE MARKET	
1.7	COMPANY LOCATION(S)	
1.8	NUMBER OF EMPLOYEES	
1.9	NUMBER OF EMPLOYEES IN ACCOUNT MANAGEMENT	
1.110	NUMBER OF EMPLOYEES IN TECHNICAL SUPPORT	
1.11	KEY BUSINESS PARTNERSHIPS	

2.0	CAPABILITIES
2.1	Q: Why do you believe that you are a good fit with our organization?
	A:
2.2	Q: What do you feel your overall strengths and differentiators are?
	A:
2.3	Q: Do you monitor, manage, support, and secure client IT systems 24/7?
	A:
2.4	Q: What is your typical client size supported by your company?
	A:
2.5	Q: What services do you offer in additional to managed IT?
	A:
2.6	Q: Describe the hiring process you follow for your technical staff that will have access to our systems, including background checks and qualifications.
	A:
2.7	Q: Describe your onboarding/implementation process and approach if you were selected?
	A:
2.8	Q: Please provide a general overview of your IT process.
	A:
2.9	Q: Is the audit of the current network included or is it separate charge?
	A:
2.10	Q: How do you typically work with clients who have in-house IT professionals?
	A:
2.11	Q: What cybersecurity measures do you have in place for your own company?
	A:
2.12	Q: Which cybersecurity frameworks do you recommend and support?
	A:
2.13	Q: Do you offer equipment procurement services? (please explain)
	A:

2.13	Q: What type of general expertise can you provide in key technology areas?
	A:
2.14	Q: Is your managed IT support remote, on-site or both?
	A:
2.15	Q: Please elaborate the different ways the [COMPANY] team can request technical support?
	A:
2.16	Q: Do you offer managed firewalls or other managed technology?
	A:
2.17	Q: How are the service tickets prioritized and escalated? (explain you SLA)
	A:
2.18	Q: Do you have a VIP support tier?
	A:
2.19	Q: Is your support team available 24/7? Please elaborate on their location and if they are sub-contracted.
	A:
2.20	Q: What are your criteria for recommending infrastructure upgrades (e.g. new workstations, switches, SIEM solutions, etc.)?
	A:
2.21	Q: How do you bill for projects: moves, adds, and changes?
	A:
2.22	Q: What type of documentations are utilized to support strategic objectives including technology planning, uptime, quality of service, business continuity, disaster recovery, and compliance?
	A:
2.23	Q: How is the support team incentivized to deliver an exceptional client experience?
	A:
2.24	Q: What does client success look like to you?
	A:

2.25	**Q: Which vendors figure prominently into your solution recommendations?**
	A:
2.26	**Q: Which cybersecurity and compliance-friendly solutions do you typically recommend (MDM, SSO, SIEM, EDR, Encryption, etc.)? Please elaborate.**
	A:
2.27	**Q: Do you provide third-party application + vendor support?**
	A:
2.28	**Q: How often are your rates adjusted?**
	A:

3.0	TECHNOLOGY
3.1	**Q: What Remote, Monitoring, and Management (RMM) solution do you use?**
	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 SIEM or other security-based technology?**
	A: A
3.6	**Q: What tools do you use for network monitoring?**
	A:
3.7	**Q: What tools are used for end-user training for security compliance?**
	A:
3.8	**Q: What solution do you offer for laptop/workstation encryption?**
	A:
3.9	**Q: Do you offer training on Microsoft products?**
	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: Describe any documentation and support (e.g., user manuals, online help, interactive demos, web-based seminars, and online knowledge base) that will be available, both from the technical perspective and the end user perspective.
	A:
4.3	Q: Describe any user groups, websites, newsletters, conferences, or any other means you support for sharing information and soliciting service feedback.
	A:
4.4	Q: What is your willingness or ability to support the security systems, phone systems, audio/visual systems?
	A:
4.5	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:
4.6	Q: How do you monitor customer satisfaction and quality assurance on an ongoing basis and how might we benefit from this process?
	A:
4.7	Q: What options are available for user training and technical training that may be required by staff?
	A:

5.0	PRICING & CONTRACTS
5.1	PROVIDE A PROPOSAL FOR MANAGED IT SERVICES WITH MONTHLY FEES AND ONE-TIME ONBOARDING/SET-UP PROJECT FEES.
5.2	MASTER SERVICES AGREEMENT OR OTHER LEGAL DOCUMENTS.

6.0	REFERENCES
6.1	PROVIDE 3 CLIENT REFERENCES.
6.2	PROVIDE 3-4 STAFF REFERENCES.