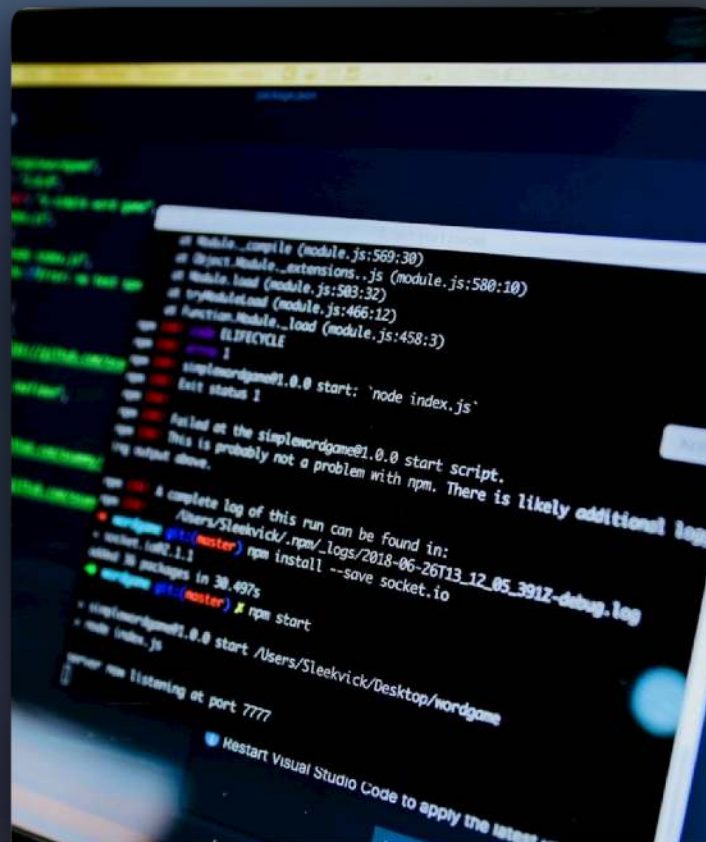# HOW TO NEGOTIATE IT SOFTWARE PRICES WITH AN RFP

A Winning RFP Template for Saving Money (and Making Executives Happy in the Process)

2024 Edition   comparitech

1. INTRODUCTION AND INSTRUCTIONS

1.1 PURPOSE OF THE RFP

Provide a brief overview of the purpose of the RFP. For example:

Our organization is seeking proposals from qualified vendors for a Remote Administration Tool (RAT) that allows secure, efficient, and reliable access to our systems from remote locations. The tool should enhance our IT support capabilities, improve system management, and support remote work initiatives.

1.2 INSTRUCTIONS FOR VENDORS

- **Submission Deadline:** Proposals must be submitted by [Insert Deadline] to [Insert Contact Information].

- **Submission Format:** Vendors should submit proposals electronically in PDF format.

- **Questions and Clarifications:** Any questions regarding this RFP should be directed to [Insert Contact Person] at [Insert Email/Phone Number] by [Insert Date].

- **Proposal Validity Period:** All proposals must remain valid for a minimum of [Insert Number] days from the submission deadline.

2. COMPANY BACKGROUND

2.1 ORGANIZATIONAL OVERVIEW

Provide information about your organization.

- **Company Name:** [Insert Company Name]

- **Industry:** [Insert Industry]

- **Number of Employees:** [Insert Number]

- **Locations:** [Insert Locations]

- **Current IT Infrastructure Overview:**

  - **Number of Workstations and Servers:** [Insert Number]

  - **Operating Systems Used:** [Insert Details]

  - **Existing Remote Access Tools:** [Insert Details]

2.2 CURRENT CHALLENGES

Describe the challenges your organization faces with remote administration.

- **Examples:**
  - Inefficient remote support leading to prolonged downtime.
  - Security concerns with existing remote access methods.
  - Difficulty managing devices across multiple locations.
  - Limited support for remote work initiatives.

3. PROJECT SCOPE AND OBJECTIVES

3.1 PROJECT GOALS

Define what you aim to achieve with the new remote administration tool.

- **Enhance Support Efficiency:** Provide IT staff with tools to resolve issues remotely and promptly.

- **Improve Security:** Secure remote connections to prevent unauthorized access.

- **Support Remote Work:** Enable employees to access company resources from remote locations securely.

- **Centralized Management:** Manage all devices and systems from a single platform.

3.2 SCOPE OF WORK

Describe the expected services and deliverables.

- **Solution Implementation:** Deployment and configuration of the remote administration tool.

- **Integration:** Compatibility with existing systems and applications.

- **Training:** Provision of training sessions and documentation for IT staff.

- **Support:** Ongoing technical support and maintenance services.

4. TECHNICAL REQUIREMENTS

4.1 FUNCTIONAL REQUIREMENTS

Specify the desired features and functionalities.

- **Remote Access and Control:**
  - Secure remote desktop access to workstations and servers.
  - File transfer capabilities between local and remote systems.
  - Support for remote printing and clipboard sharing.
- **Multi-Platform Support:**
  - Compatibility with Windows, macOS, and Linux operating systems.
  - Mobile device support for iOS and Android.
- **User Management:**
  - Role-based access control (RBAC).
  - Multi-user collaboration on remote sessions.
- **Automation and Scripting:**
  - Ability to execute scripts remotely.
  - Automation of routine maintenance tasks.
- **Monitoring and Reporting:**
  - Real-time monitoring of system performance.
  - Activity logs and session recordings.
  - Customizable reporting features.

4.2 TECHNICAL SPECIFICATIONS

Detail the technical criteria the solution must meet.

- **Connectivity:**
  - Support for various network environments, including NAT and firewalls.
  - Low bandwidth consumption with adaptive compression.

- **Scalability:**
  - Ability to manage at least [Insert Number] devices.
  - Support for future expansion without significant additional costs.

- **Integration:**
  - APIs or connectors for integration with existing IT service management (ITSM) tools.
  - Compatibility with authentication systems (e.g., Active Directory, LDAP).

5. SECURITY AND COMPLIANCE

5.1 SECURITY STANDARDS

Outline the security requirements.

- **Encryption:**
  - End-to-end encryption using AES-256 or higher.
  - Secure protocols such as SSL/TLS for data transmission.

- **Authentication:**
  - Support for multi-factor authentication (MFA).
  - Integration with single sign-on (SSO) solutions.

- **Access Controls:**
  - Granular permission settings for users and groups.
  - Audit trails for all remote sessions and administrative activities.

5.2 COMPLIANCE REQUIREMENTS

Specify compliance and regulatory requirements.

- **Data Protection:**
    - Compliance with GDPR, HIPAA, or other relevant regulations.
    - Data residency options if required.
- **Audit and Reporting:**
    - Detailed logs that meet compliance auditing standards.
    - Ability to export logs for external analysis.

6. VENDOR QUALIFICATIONS

6.1 COMPANY INFORMATION

Request details about the vendor.

- **Company Overview:**
  - Company Name:
  - Headquarters Location:
  - Years in Business:
  - Number of Employees:
- **Experience:**
  - Number of remote administration solutions deployed.
  - Experience in [Insert Industry, if relevant].
- **Financial Stability:**
  - Annual revenue for the past three years.
  - Relevant financial statements.

6.2 CLIENT REFERENCES

Ask for references from similar projects.

- **Reference #1:**
  - ◦ Client Name:
  - ◦ Contact Person:
  - ◦ Email and Phone:
  - ◦ Brief Description of Services Provided:
- **Reference #2:**
  - ◦ [Repeat as above.]

6.3 CERTIFICATIONS AND AWARDS

Request information on any relevant certifications.

- **Certifications:**
  - ◦ Security certifications (e.g., ISO 27001, SOC 2 Type II).
  - ◦ Industry-specific certifications.
- **Awards and Recognitions:**
  - ◦ Industry awards or acknowledgments.

7.
IMPLEMENTATION PLAN

7.1 PROPOSED TIMELINE

Outline expected timelines.

- **Project Kickoff:** [Insert Date]

- **Implementation Phases:**

  - **Phase 1:** [Insert Description and Dates]

  - **Phase 2:** [Insert Description and Dates]

  - **Phase 3:** [Insert Description and Dates]

- **Go-Live Date:** [Insert Date]

- **Post-Implementation Support:** [Insert Duration]

7.2 SUPPORT AND TRAINING

Specify requirements for training and support.

- **Training:**
  - On-site or virtual training sessions for administrators.
  - User guides and documentation.
- **Support:**
  - 24/7 technical support availability.
  - Service Level Agreements (SLAs) for issue resolution.

8. PRICING STRUCTURE

8.1 COST BREAKDOWN

Provide templates for vendors to input pricing.

- **DescriptionQuantityUnit PriceTotal Price**

- **Implementation Costs:**

    - Installation and Configuration:

    - Customization:

    - Training:

- **Maintenance and Support:**

    - Annual Support Fees:

    - Updates and Upgrades:

- **Other Costs:**

    - [Insert any additional costs.]

8.2 PAYMENT TERMS

Define preferred payment schedules.

- **Payment Schedule:**

  - [e.g., 30% upon signing, 40% upon delivery, 30% after acceptance.]

- **Payment Methods:**

  - [e.g., Wire Transfer, Check, Credit Terms.]

9.
EVALUATION CRITERIA

9.1 SCORING MATRIX

Provide a framework for evaluating proposals.

Criteria	Weight (%)	Vendor Score
Functionality and Features	30%	
Technical Compatibility	20%	
Vendor Experience	15%	
Implementation Plan	10%	
Pricing	15%	
Support and Training	10%	
Total	**100%**	

9.2 EVALUATION PROCESS

Explain how proposals will be assessed.

- **Initial Screening:** Verification of compliance with RFP requirements.

- **Detailed Evaluation:** Scoring based on the criteria above.

- **Demonstrations:** Shortlisted vendors may be invited for product demos.

- **Reference Checks:** Contacting provided references for feedback.

10. TERMS AND CONDITIONS

10.1 CONFIDENTIALITY

All information contained in this RFP is confidential and must not be disclosed to third parties.

10.2 PROPOSAL PREPARATION COSTS

Vendors are responsible for all costs incurred in the preparation and submission of their proposals.

10.3 RFP AMENDMENTS

The organization reserves the right to amend or cancel this RFP at any time.

10.4 ACCEPTANCE OF PROPOSALS

The lowest-priced or any proposal may not necessarily be accepted. The organization reserves the right to reject any or all proposals.

10.5 LEGAL REQUIREMENTS

Vendors must comply with all applicable laws and regulations.

11.
APPENDICES

APPENDIX A: CURRENT IT ENVIRONMENT DETAILS

Provide additional technical details about your current environment.

- **Network Architecture Diagrams**
- **Existing Software and Tools**
- **Authentication Methods Used**

APPENDIX B: VENDOR RESPONSE FORMAT

Outline how vendors should structure their responses.

- **Executive Summary**

- **Detailed Responses to Technical Requirements**

- **Implementation Plan**

- **Pricing Details**

- **Additional Information**

INSTRUCTIONS FOR USING THIS TEMPLATE

- **Customization:** Replace all placeholder text enclosed in brackets [ ] with your organization's specific information.

- **Formatting:** Ensure consistent formatting throughout the document for a professional appearance.

- **Legal Review:** Have your legal team review the RFP before issuing it to vendors.

- **Distribution:** Send the RFP to a shortlist of qualified vendors or publish it on your procurement portal.

ADDITIONAL TIPS

- **Clarity:** Be as specific as possible in your requirements to receive relevant proposals.

- **Deadlines:** Allow sufficient time for vendors to prepare their proposals, especially if the requirements are complex.

- **Communication:** Establish a single point of contact for all vendor communications to streamline the process.

Disclaimer: This RFP template is provided for informational purposes only. It should be reviewed and modified as necessary to meet your organization's specific needs and legal requirements.

2. SAMPLE RFP FOR REMOTE ADMINISTRATION TOOLS

[DESIGNSOFT
LOGO HERE]

REQUEST FOR PROPOSAL (RFP)

For Remote Administration Tool

Date Issued: October 18, 2023
Response Deadline: November 15, 2023

TABLE OF CONTENTS

1. INTRODUCTION AND INSTRUCTIONS

1.1 PURPOSE OF THE RFP

DesignSoft Inc. is seeking proposals from qualified vendors for a Remote Administration Tool (RAT) to enhance our IT support capabilities, improve system management, and support our remote work initiatives. We are particularly interested in evaluating **NinjaOne** as a potential solution.

1.2 INSTRUCTIONS FOR VENDORS

- **Submission Deadline:** Proposals must be submitted by **November 15, 2023**, to the contact information provided below.

- **Submission Format:** Please submit proposals electronically in PDF format.

- **Contact Information:**

  - **Contact Person:** Emily Johnson, IT Procurement Manager

  - **Email:** emily.johnson@designsoft.com

  - **Phone:** +1 (555) 123-4567

- **Questions and Clarifications:** Any questions regarding this RFP should be directed to the contact person above by **November 1, 2023**.

- **Proposal Validity Period:** All proposals must remain valid for a minimum of **60 days** from the submission deadline.

2. COMPANY BACKGROUND

2.1 ORGANIZATIONAL OVERVIEW

- **Company Name:** DesignSoft Inc.
- **Industry:** Software Development and Design Solutions
- **Number of Employees:** 2,500
- **Locations:** Headquarters in San Francisco, CA, with offices in New York, London, and Bangalore.
- **Current IT Infrastructure Overview:**
  - **Number of Workstations and Servers:**
    - Workstations: Approximately 2,200
    - Servers: Approximately 300
  - **Operating Systems Used:**
    - Windows 10 and 11 for client machines
    - macOS Catalina and Big Sur
    - Linux (Ubuntu and CentOS) for development environments
    - Windows Server 2016 and 2019
  - **Existing Remote Access Tools:**
    - Native Remote Desktop Protocol (RDP)
    - VPN solutions for remote access
    - Custom SSH scripts for Linux servers

2.2 CURRENT CHALLENGES

- **Inefficient Remote Support:** Delays in resolving technical issues for remote employees.

- **Security Concerns:** Existing remote access methods lack robust security features.

- **Device Management Difficulties:** Challenges in managing devices across multiple global locations.

- **Limited Remote Work Support:** Need to better support employees working from home or in the field.

3. PROJECT SCOPE AND OBJECTIVES

3.1 PROJECT GOALS

- **Enhance Support Efficiency:** Enable IT staff to resolve issues remotely and promptly.

- **Improve Security:** Implement secure remote connections to protect company assets.

- **Support Remote Work:** Facilitate secure access to company resources for remote employees.

- **Centralized Management:** Manage all devices and systems from a unified platform.

3.2 SCOPE OF WORK

- **Solution Implementation:** Deployment and configuration of **NinjaOne** across all devices.

- **Integration:** Seamless integration with existing ITSM tools and authentication systems.

- **Training:** Provide comprehensive training for IT administrators and support staff.

- **Support:** Ongoing technical support and maintenance, including updates and patches.

4. TECHNICAL REQUIREMENTS

4.1 FUNCTIONAL REQUIREMENTS

Remote Access and Control:

- Secure remote desktop access to Windows, macOS, and Linux systems.
- File transfer capabilities with drag-and-drop functionality.
- Support for remote command-line access (CMD, PowerShell, SSH).
- Remote printing and clipboard sharing features.

Multi-Platform Support:

- Full support for Windows 10/11, macOS Catalina and above, and Linux distributions (Ubuntu, CentOS).
- Mobile device support for iOS and Android platforms.

User Management:

- Role-based access control (RBAC) for different administrative levels.
- Multi-user collaboration on remote sessions for team troubleshooting.

Automation and Scripting:

- Ability to execute scripts remotely in various scripting languages (PowerShell, Bash).
- Automation of routine tasks such as software updates and system maintenance.

Monitoring and Reporting:

- Real-time monitoring of system performance metrics (CPU, memory, disk usage).
- Detailed activity logs and session recordings for auditing purposes.
- Customizable dashboards and reporting tools.

4.2 TECHNICAL SPECIFICATIONS

Connectivity:

- Operability in diverse network environments, including behind NAT and firewalls.

- Adaptive bandwidth usage with compression algorithms to optimize performance.

Scalability:

- Management capacity for at least 3,000 devices with potential for growth.

- Cloud-based solution preferred for scalability and ease of updates.

Integration:

- APIs or connectors for integration with our existing ITSM tool (ServiceNow).

- Compatibility with Active Directory and Azure AD for authentication.

5. SECURITY AND COMPLIANCE

5.1 SECURITY STANDARDS

ENCRYPTION:

- End-to-end encryption using AES-256-bit encryption.
- Use of SSL/TLS protocols for all data transmissions.

Authentication:

- Support for multi-factor authentication (MFA) using tokens or mobile apps.
- Integration with single sign-on (SSO) solutions like Okta or Azure AD.

Access Controls:

- Granular permission settings, allowing control over which technicians can access which devices.
- Comprehensive audit trails for all remote sessions and administrative actions.

5.2 COMPLIANCE REQUIREMENTS

Data Protection:

· Compliance with GDPR, ensuring data privacy for our European employees.

· Options for data residency to store data within specific geographic locations.

Audit and Reporting:

· Detailed logs that meet SOX compliance standards.

· Ability to export logs and reports for external compliance audits.

6. VENDOR QUALIFICATIONS

6.1 COMPANY INFORMATION

Company Overview:

- **Company Name:** NinjaOne
- **Headquarters Location:** Austin, TX, USA
- **Years in Business:** Over 7 years
- **Number of Employees:** [Vendor to Provide]

Experience:

- Extensive experience providing remote monitoring and management solutions.
- Serving over 6,000 customers globally, including organizations in the software development industry.

Financial Stability:

- [Vendor to Provide Annual Revenue and Financial Statements]

6.2 CLIENT REFERENCES

REFERENCE #1:

- **Client Name:** TechSolutions Corp.
- **Contact Person:** Sarah Thompson, IT Director
- **Email and Phone:** sarah.thompson@techsolutions.com, +1 (555) 987-6543
- **Description:** Implementation of NinjaOne for remote management of over 2,000 devices across multiple locations.

REFERENCE #2:

- **Client Name:** Innovatech Inc.
- **Contact Person:** Mark Allen, Infrastructure Manager
- **Email and Phone:** mark.allen@innovatech.com, +1 (555) 246-8101
- **Description:** Deployed NinjaOne with customized automation scripts and integration with existing ITSM tools.

6.3
CERTIFICATIONS AND AWARDS

CERTIFICATIONS:

- SOC 2 Type II Compliance
- ISO 27001 Certified

AWARDS AND RECOGNITIONS:

- Recognized in Gartner Peer Insights for IT Service Management Tools
- Awarded "Best Remote Monitoring and Management Solution" in 2022 by Industry Tech Awards

7.
IMPLEMENTATION PLAN

7.1 PROPOSED TIMELINE

- **Project Kickoff:** December 1, 2023
- **Phase 1:** Requirements Analysis and Planning (Dec 1 - Dec 15, 2023)
- **Phase 2:** Deployment and Configuration (Dec 16 - Jan 31, 2024)
- **Phase 3:** Integration and Testing (Feb 1 - Feb 28, 2024)
- **Phase 4:** Training and Documentation (Mar 1 - Mar 15, 2024)
- **Go-Live Date:** March 16, 2024
- **Post-Implementation Support:** March 2024 - March 2025 (12 months)

7.2
SUPPORT AND TRAINING

TRAINING:

- On-site training sessions for IT administrators and support staff.

- Access to online training resources and certification programs.

- Customized training materials specific to DesignSoft's environment.

SUPPORT:

- 24/7 technical support via phone, email, and live chat.

- Dedicated customer success manager for project oversight.

- Regular updates, patches, and access to beta features.

8. PRICING STRUCTURE

8.1 COST BREAKDOWN

8.1 COST BREAKDOWN

Licensing Fees:

Description	Quantity	Unit Price	Total Price
NinjaOne Device Licenses	2,500 devices	[Vendor to Provide]	[Vendor to Provide]

IMPLEMENTATION COSTS:

- **Deployment and Configuration:** [Vendor to Provide]
- **Integration with ITSM and Authentication Systems:** [Vendor to Provide]
- **Customization and Scripting:** [Vendor to Provide]

TRAINING COSTS:

- **On-site Training Sessions:** [Vendor to Provide]
- **Training Materials:** Included

MAINTENANCE AND SUPPORT:

- **Annual Support and Maintenance Fee:** [Vendor to Provide]

OTHER COSTS:

- Additional modules or features: [Vendor to Provide]
- Travel expenses (if applicable): [Vendor to Provide]

8.2 PAYMENT TERMS

PAYMENT SCHEDULE:

- 30% upon signing the contract
- 40% upon completion of Phase 2 (Deployment and Configuration)
- 20% upon Go-Live Date
- 10% after 30 days of successful operation

PAYMENT METHODS:

- Wire Transfer
- Payment terms are Net 30 days from invoice date

9.
EVALUATION CRITERIA

9.1 SCORING MATRIX

Criteria	Weight (%)	Vendor Score
Functionality and Features	30%	[Vendor to Score]
Technical Compatibility	20%	[Vendor to Score]
Vendor Experience	15%	[Vendor to Score]
Implementation Plan	10%	[Vendor to Score]
Pricing	15%	[Vendor to Score]
Support and Training	10%	[Vendor to Score]
Total	**100%**	

9.2 EVALUATION PROCESS

- **Initial Screening:** Verification of compliance with RFP requirements.

- **Detailed Evaluation:** Scoring based on the criteria above.

- **Product Demonstrations:** Shortlisted vendors will be invited for on-site or virtual demos of NinjaOne.

- **Reference Checks:** Contacting provided references for feedback.

- **Final Selection:** Based on overall score and alignment with DesignSoft's needs.

10. TERMS AND CONDITIONS

10.1 CONFIDENTIALITY

All information contained in this RFP is confidential and must not be disclosed to third parties without prior written consent from DesignSoft.

10.2 PROPOSAL PREPARATION COSTS

Vendors are responsible for all costs incurred in the preparation and submission of their proposals.

10.3 RFP AMENDMENTS

DesignSoft reserves the right to amend or cancel this RFP at any time. Any amendments will be communicated in writing to all participating vendors.

10.4 ACCEPTANCE OF PROPOSALS

DesignSoft is not obligated to accept the lowest-priced or any proposal. We reserve the right to reject any or all proposals or to accept the proposal that we deem to be in the best interest of our organization.

10.5 LEGAL REQUIREMENTS

Vendors must comply with all applicable federal, state, and local laws and regulations.

11.
APPENDICES

APPENDIX A: CURRENT IT ENVIRONMENT DETAILS

NETWORK ARCHITECTURE:

- Multi-site network with data centers in San Francisco, New York, London, and Bangalore.
- High-speed WAN connectivity with redundancy and failover capabilities.

EXISTING SOFTWARE AND TOOLS:

- ITSM Tool: ServiceNow
- Authentication: Active Directory and Azure AD
- Collaboration Tools: Microsoft Teams, Slack
- Development Environments: Visual Studio, Eclipse, various IDEs

AUTHENTICATION METHODS USED:

- Active Directory Domain Services (AD DS)
- Azure Active Directory Sync for cloud services
- Single Sign-On (SSO) via SAML and OAuth for third-party applications

APPENDIX B: VENDOR RESPONSE FORMAT

Vendors are requested to structure their responses as follows:

1. **Executive Summary**

2. **Detailed Responses to Technical Requirements**

3. **Implementation Plan**

4. **Pricing Details**

5. **Vendor Qualifications**

6. **Support and Training Details**

7. **Terms and Conditions**

8. **Appendices and Supporting Documents**