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+ DEPLOY IN DAYS / TRAIN IN 1 HOUR
+ HIGHLY CUSTOMIZABLE WITHOUT PROGRAMMING OR CONSULTANTS
+ ROBUST, FAST & PAINLESS REPORTING FOR HIGHER QUALITY DECISION-MAKING

SAMPLE IT SERVICE MANAGEMENT (ITSM) REQUEST FOR PROPOSAL (RFP)

How can you develop an ITSM RFP?

What information should be gathered from vendors?

What are other business requirements for the RFP?

Your Company, Inc.

Request for Competitive Proposals for an IT Service Management System

Background

Enter your organization's background here.

Engagement

We are seeking bids for an IT Service Management system that will allow our organization to manage IS processes for Incident, Request, Change, Problem, Asset, Knowledge, and Service Level.

The ideal solution would be Software as a Service (SaaS/Cloud) that would assist us in Incident, Request, and Asset tracking, Change, Security and Report requests. We expect the bid to include separate line items for licensing, maintenance implementation services, and training.

Qualifications and Requirements

- Description of the firm
- Submit biography/profile of the staff who would be our primary contacts for implementation, training, troubleshooting. Include their background/credentials.
- Submit a table/timeline of activities for a typical implementation/training process.
- Please provide any additional information that makes you particularly qualified, or special features of your software that will help us achieve our goal of streamlining and increased efficiency.
- List any experience you have had with [industry (eg. healthcare/hospitals)] organizations including: # of organizations/companies using the technology, the largest deployment to date in terms of number of end point devices and users, and explanation of integration capabilities with the systems specified in this bid package.
- Please submit a list of client references we may contact.

System Specifications (please answer all questions below)

1. Required
    A. Service Management functionality
        1. The proposed solution should be capable of logging calls for Incidents and Requests.
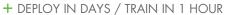   2. Provides ITIL compliant Incident management.

3. Provides ITIL compliant Request Management including the ability to support access requests (Access Management).
4. Supports self-service requests through email and web portal.
5. Provides time tracking for staff.
6. Allows the user interface and record fields to be modified by the administrators.
7. Provides workflows for multi-user approvals or complex task coordination.
8. Provides ITIL-compliant Change Management with a calendar view of scheduled changes.
9. Provides a built-in Knowledge management system.
10. Provides ITIL-compliant Release and Deployment Management.
11. Provides ITIL-compliant Asset and Configuration Management.
12. Provides ITIL-compliant Service Level Management.
13. Data can be shared and transferred across record types (eg. incident data can be populated in change record without reentering).
14. Provides a mobile interface for ticket access by field support and management.
15. Provides robust reporting by individual ticket assignments, team, department, division, or enterprise.
16. Provides metrics to support Continual Service Improvement.
17. Provides automated escalation of incidents and requests.
18. Provides SLA tracking reporting.
19. Provides Customer Survey capability with reporting, and customizable notifications and external logos.
20. Ability to create child tickets from a parent ticket and maintain relationship between tickets.
21. Provides access to record database for additional reporting.
22. Reporting includes ticket reassignment tracking.
23. API for developing interfaces to existing Organizations.
24. LDAP/ADFS Azure integrations to allow SSO.

B. Experience and Support
   1. How many Service Management solutions has your company implemented?
   2. How many implementations have you done for an organization our size?
   3. How long has your product been on the market?
   4. What percent of the Service Management market does your product have?
   5. What is your largest implementation?
   6. Does the solution provide built-in High Availability and Disaster Recovery? Explain.
   7. What type of remote access is required for support?
   8. What are the levels of support and cost? (eg. Silver, Gold, Platinum)
   9. What is the process for reporting defects to our organization?
   10. What is the service level for incidents?
   11. What is the service level for defect resolution?

12. What is the service level for enhancement requests?
13. Describe your support escalation process.
14. Where are your support calls answered? Where is you support staff located? What is the size of your support staff? Are they 24/7?
15. How do you handle integration problems?
16. Explain your support model and escalation.
17. Explain Service Levels and remediation if service levels not met.

C. Migration
1. What other products and tools does your solution integrate with?
2. Describe how your solution handles encryption at rest.
3. Explain in detail how your solution migrates data to/from other systems.
4. Does the proposed solution include all costs required to integrate with the existing interfaces (Lawson, Active Directory, Asset Database, etc.)?
5. What third-party vendors do you work with?
6. Are APIs supported? List and explain all supported APIs.

D. Access
1. Can your product be accessed via the web?
2. Are there limits to the number of users who can access?
3. Does it support [XXX] concurrent IS agents and XX administrators?
4. Does it provide support for granular access authorization?

E. Architecture/Capacity
1. What Operating Systems can your solution run on?
2. What databases would our information reside in? Can we have access to those databases?
3. Do we share infrastructure with other customers? Explain.
4. How is our privacy and performance guaranteed in a shared environment?
5. Does your product have Active Directory support and integration?
6. Is it highly scalable? Detailed explanation required. What is your ceiling?
7. Is the solution highly available? If yes, explain how that is achieved and if additional costs are required.
8. Is there a SQL interface for queries and administration?
9. Can controls/limits be placed on queries?
10. What measures are there to ensure data integrity? Explain.
11. Are attributes stored in metadata?
12. Is there support for data mining and statistics?
13. What is the recommended Disaster Recovery and Business Continuity for your solution?
14. Are you HIPAA Compliant?
15. Standard Web Application: Is there an auto log out feature if you close the browser?

F. Cost
1.   How is the product licensed? Explain thresholds and discounts.
2.   Provide real ROIs from actual customers.
3.   What are the variable costs? (eg. conversions, tools)
4.   Are test/training instances available?
5.   Are licenses required for test and DR environments?
6.   What are the Implementation/Training costs?

2. Desired Features
A. Project task management.
B. Request status tracking for customers.
C. Streamlined & customizable customer front-end interface.

3. Other
A. What certifications has your product achieved (eg. ITSM, Pink Elephant)? Explain.

Fees and Assumptions

Responses should include all costs, fees, and estimated expenses, including equipment, professional services, training services, licensing, and ongoing maintenance and support for 1 and 3-year options. The fees must include a tiered licensing model to allow for additional licenses to be added at a defined cost if required.

Submission and Selection

Proposals must be submitted by the date indicated in this request for proposal.

RFP Issue Date: _____

Inquiry Period Begins: _____

Inquiry Period Ends: _____

RFP Due Date: _____

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ABOUT GIVA

Founded in 1999, Giva was among the first to provide a suite of help desk and customer service/call center applications architected for the cloud.

Now, with hundreds of customer driven releases, the Giva Service Management™ Suite delivers an intuitive, easy-to-use design that can be deployed in just days and requires only one hour of training. Giva's robust, fast and painless reporting/analytics/KPIs quickly measure team productivity, responsiveness and customer satisfaction resulting in faster and higher quality decision-making. Customization and configuration are all point and click with no programming or consultants required to deliver a substantially lower total cost of ownership.

Giva is a private company headquartered in Sunnyvale, California serving delighted customers worldwide.

robust, fast & painless reporting for higher quality decision-making

deploy in days, train in 1 hour

highly customizable without programming or consultants

the **Giva**difference