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blacklinegroup.com

RFP Guide and Template

Managed Cloud Hosting Services

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I. Introduction and Use of the Guide

The Blackline RFP template is intended to assist procurement professionals in the creation and execution of a wide range of RFPs across industries and procurement spend categories. Although organizational and product/service needs vary, this template is a useful starting point from which to configure and customize to meet your company's specific needs.

This RFP is part of a series Blackline has identified as opportunistic and relevant based on current macro and micro economic factors, common stakeholder engagements, and complexity.

For additional information and access to pricing and scoring worksheets, please contact Blackline to speak with one of our industry experts on how we can Power Up your procurement function with our inclusive back-office support, on-site procurement services, or Blackline's Procurement Roadmap which has transformed some of the world's largest companies covering more than $100 billion in spend. It is Blackline's commitment to bring people together to elevate procurement's role and results!

Blackline Group Inc.

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II. Request for Proposal – Managed Cloud Hosting Services

A) RFP Document

1) Company Overview:

   Overview Insight [*delete italics and replace with your information*]

   Provide a brief overview of your organization providing relevant context for participating suppliers.

   a) *Corporate mission*
   b) *Portfolio of products/services*
   c) *Employee count*
   d) *Geographical footprint*
   e) *Company culture*
   f) *Principles and values*

   Sample:

   [Enter Company name] is the world's largest service provider with more than 80 million members in 100 countries and territories around the globe.

   Our mission: Create mutually beneficial opportunities for every one of our customers. Our customers get access to [list all services] helping you be successful. [Enter Company name] started out in the garage of our co-founder John Doe in [enter date] and has grown to the size of [enter detail].

   John Doe is the CEO, and the company's management team is made up of seasoned executives who share a common vision and end-goal. [Enter Company name] has a diversified business model with revenues coming from several different services and products.

2) Objective:

   Objective Insight [*delete italics and replace with your information*]

   Thoroughly describe the objective of this RFP with as many pertinent details as possible to ensure a clear and comprehensive vision is shared with suppliers. Adding all applicable details including historical and forecasted data, impacted business units, timelines, and expectations will reduce the number of questions suppliers have following the dissemination of the RFP.

   Sample:

[Enter Company name] is looking to upgrade and consolidate its cloud web managed solution to facilitate additional forecasted growth, provide best-in-class experiences for customers and increase the agility and functionality of the solution for 150 websites and 4,500 development environments. Currently, [enter Company name] is looking to improve or add-on to its virtual private server (VPS), dedicated hosted servers, colocation options, cloud hosting and managed hosting. While the scope is broad at this point, there are several functions both internal and consumer facing [enter Company name] is looking to address. In order of importance, however, please focus primarily on customer facing web management, accessibility, and compliance. We appreciate your flexibility to offer broad solutions to leverage and optimize the company from a holistic standpoint.

3) Background:

Background Insight [delete italics and replace with your information]

Provide a wide-ranging history of desired web-based cloud hosting services to offer suppliers an understanding of where your company has been and how you arrived at your current [service/product] state of requirements. Where possible, omit all current negative service levels to protect the organization from predatory bidding and to ensure strong partnering and continuity of supply with the incumbent supplier.

Background Sample

[Enter Company name] is an industry leader in [enter service/product] and while there is a significant reliance on best-in-class solutions, rapid growth has led to a number of bolt-on and highly customized results as corporate IT and other teams have had to adapt on the fly to ensure continuity and minimal obstruction to revenue growth. The aggregate of these solutions has led to a number of infrastructural constraints as well as scale and customization issues [enter Company name] is looking to solve through this and future projects.

4) Service Requirements:

Service Requirements Insight [delete italics and replace with your information]

Provide a list of requirements suppliers can turn to for an easy go-to list to ensure all components are considered when submitting bids.

Managed Cloud Hosting Services requirements:

a) *Account & project management*
b) *Thorough understanding of [enter Company's name] positions (current and future)*
c) *Cultural and environmental comprehension of [enter Company's name]*

d) *Copyright direction and comprehension both general and specific to [enter Company name]*

e) *Content migration*

f) *Content management*

g) *Video production*

h) *Photography utilization and enhancement*

i) *Brand positioning*

j) *Reporting experience*

k) *Experience with Azure*

l) *Front and back-end development*

m) *UX & UI development*

n) *Experience managing virtual private services (VPS)*

o) *Optimization of AWS*

p) *HTML/CSS*

q) *APIs and backend coding*

r) *B2B efficacy*

s) *Information design*

t) *Paid search placement*

u) *Search engine enhancements (current and ongoing)*

Additional Requirements:

Strategically partnering with the IT, operations, and Marketing organizations to align on vision and deliver best-in-class solutions to meet current and future initiatives and campaigns.

Extensive experience with e-commerce solutions with demonstrable vision and solutions to drive ease and optimization of sales.

Legacy browser support: [enter Company name] wants to ensure all legacy browser engines are supported through the end of 2030 with a 20-year agile roadmap to adapt to ever changing technological advancements.

5) Current/Future Resources Structure:

Resource Structure Insight [delete italics and replace with your information]

Provide a list of current resources as well as future resource requirements to provide suppliers with information regarding personal involved with the product or service.

a) *Current services personnel*

b) *Leadership*

c) *Project managers*

d) *Supporting personnel*

e) *Marketing teams*

f) *IT infrastructure*

g) *Facilities infrastructure*

Resource Structure Sample

Please see the list below for all [Company's] existing resources supporting [enter service/product] as well as future planned resource allocation.

a) *Project Manager: 3 FTE*

b) *Project Manager of Implementation (future): 1 FTE*

c) *IT Security Manager: 4 FTE*

d) *Creative Resources: 5 FTE*

e) *Media Resources: 3 FTE*

6) Countries of Operation:

Countries of Operations Insight [delete italics and replace with your information]

Provide a list of applicable countries and employee counts for each to provide the supplier insight into your company's applicable geographic footprint.

Countries of Operations Sample

Countries of Operation (Number of Employees)			
Bangladesh (45)	*France (927)*	*Japan (529)*	*Russia (15)*
Brazil (167)	*Germany (125)*	*Mexico (65)*	*Thailand (55)*
China (55)	*India (31)*	*Nigeria (30)*	*Turkey (30)*
Egypt (370)	*Indonesia (75)*	*Pakistan (40)*	*UK (125)*
Ethiopia (21)	*Italy (51)*	*Philippines (300)*	*US (3,250)*

7) SLAs, KPIs, Metrics:

SLA, KPI, and Metrics Insight [delete italics and replace with your information]

Communicate required SLAs and metrics in the RFP as applicable to accurately for scope and the products relevant to this RFP. An option here is to add high-performance or incentive targets which are incremental service offerings above what stakeholders have required. Ensure costs are understood to reach standard SLAs as well as high-performance

targets to gauge cost ratios to service deliveries. If unknown, ask the suppliers to provide recommended SLAs.

SLA, KPI, and Metrics Sample

Please see the SLAs and metrics which will be used to govern this program. These metrics have been reviewed and approved by all stakeholders.

SLA	Measure Definition	Target	Incentive	At Risk Fees/Incentives
1	*Cloud Downtime*	*99.8%*	*5%*	*5%*
2	*Uptime %*	*99.5%*	*2%*	*2%*
3	*Restoration Time*	*15 minutes*	*1%*	*1%*
4	*Average Time Between Failures*	*60 days*	*1%*	*1%*
5	*Average Speed to Answer*	*30 seconds*	*1%*	*1%*

8) Questionnaire:

Questionnaire Insight [delete italics and replace with your information]

Deliver the most comprehensive list of questions possible for Procurement and key decision makers to adeptly understand the suppliers, their approach, and service deliveries in a side-by-side model which promotes specificity, organization, and decision making in the RFP bid analysis process.

Questionnaire sample:

Supplier Information:	1. *Please describe your organization and management structure, particularly with respect to your managed hosting services. Please include primary locations and key contacts who will be supporting [enter Company name].*
	2. *How does your company provide an operational competitive advantage over your competitors?*
	3. *Describe any significant relationships your company can offer regionally with reference to the scope of this RFP.*
	4. *Is your company currently or expecting to be involved in any mergers or acquisitions which will have any impact to your company's hosting services service offerings?*
	5. *Is your company categorized as a small or diverse business?*

	6. How does your company weigh the satisfaction of its employees to operational results and failures? Please provide detailed examples.
Managed Cloud Hosting Services Offerings:	1. Please describe the ideal hosting services management model your company can provide leading to immediate and future mutual success. Including, but not solely limited to, external resources, technology, business intelligence, process excellence, subcontractors (please provide list of all applicable third-party suppliers), etc. How does your company's management and service offering differentiate your company from your competitors?
	2. Please describe and define how your company trains people leaders, developers, code-writers and marketing teams for both client delivery and required skill sets. Please differentiate hard and soft skill capability as they pertain to your hosting services offerings and competencies.
	3. Please provide a comprehensive list of all current and forecasted supported CMS solutions where ECM and WCM was incorporated to the solution. Please be prepared to share lessons learned as well as opportunities for [enter Company name].
	4. Please list all provided applications for your managed hosting clients and provide insight into the functionality and how you believe they can augment or support [enter Company name].
	5. Will your company be able to [enter Company] name be able to provide a dedicated team? Please outline with abbreviated resumes to determine team knowledge and experience.
	6. Please detail lifecycle workflows for managed cloud hosting solutions and how your company can assist in elevating [enter Company name] to drive sales to the current customer-base as well as optimize future engagements.
	7. Please provide detail into your company's process, methodology and approach to providing scalable service levels including bench strength.
	8. How does your company manage continuity challenges on a day-to-day basis? What are your methodologies for forecasting and proactively addressing disruptors?
	9. How does your company limit personal identification information (PII) with regarding to [enter Company name] employees?
	10. What are key success factors for your most mature and successful managed hosting services clients?

	11. In detail, please describe how your company can scale hosting services deliverables by quantity and [enter Company name] geographic footprint.
	12. Please describe how your company stays current with market trends.
	13. Is your company able to utilize [enter Company name] directed providers and partners [add partners here]?
	14. With specificity, please detail how your company utilizes technology to optimize hosting services offerings. What types of technology are currently being utilized?
	15. What benchmarking resources does your company provide and/or utilize?
	16. How many new cloud hosting services clients have you secured over the past twelve (12) months? How many, if any, are in the same industry as [enter Company]?
Account Service Support:	1. Please describe and detail a full end-to-end managed cloud hosting services implementation process including, but not limited to, resource availability in [enter required timeline here], an implementation timeline with samples from previous clients, roles, responsibilities, and expected level-of-effort from both [Supplier] and [enter Company name].
	2. Will the IT implementation team be centrally located or local? Please detail global limitations and opportunities (if applicable).
	3. Can you guarantee go-live by xx/xx/xxxx
	4. Describe a comprehensive service operation for [enter Company name] regarding global hours of operation, call centers, dedicated resources, language restrictions, on-shore/off-shore resources, quality control, responsiveness to operational queries and escalations, QBRs, and other operational account governance.
	5. Please confirm you company's ability to support all countries as listed in this RFP and outline any existing or potential service constraints.
	6. Please provide overview of critical SLA/KPIs where possible and how they're utilized to drive a best-in-class program beyond those listed in this RFP. Additionally, please describe how your company plans to meet the SLA/KPIs listed in the scope section of this RFP.
	7. Is any portion or all program administrative responsibilities outsourced? If so, please provide supplier(s) and detail the

	management of the applicable supplier(s). Will [Company] be notified of outsourced suppliers?
	8. *Though not required at this stage, if so desired by both parties in the future, do you have resources available to administer the program for [enter Company name]?*
	9. *Please provide the implementation project manager(s) and their brief resume (both in industry and with your company) who will service our account. If selected, [enter Company name] will ask for your company to lock-in this resource pursuant to the executed SOW.*
	10. *Do you have dedicated tools provided for our Program Administrators? Provide best practices around service policies and procedures. Please detail the system, compatible browsers, and their reporting capabilities. Is a test environment available?*
Systems, Integrations, and Reporting	1. *Pursuant to the detailed scope of this RFP, please describe, in depth, how your systems will interface with [enter Company name] [enter ERP or other required systems here]. If we're to access your web-based portals, are you able to customize your site with [enter company]'s logo and other specific requests?*
	2. *Will [enter Company name] require any augmenting or new technology to enable automation or integration?*
	3. *Based on the information of this RFP, will customized programming be required to accomplish any integrations?*
	4. *Please confirm any web-based platform is compatible with Chrome and IE*
	5. *Information Security/Data Privacy – Please list all applicable certifications*
	6. *What type of customizations do you allow for your platform?*
	7. *How does your company handle Production and business-level IT support? Do you have a case management system? How are priorities assigned?*
	8. *How often does your company release new code into the platform? Are release notes shared with customers prior to releases in the event there are customer customizations?*
	9. *Are management reports available from a secured web site? Describe how reports can be customized by category, person, department and other common metrics. Will your company be able to provide a demo as well as samples of available reporting?*

Technology Support & Disaster Relief	1. What technical support is available for your technology and reporting packages and what hours is technical support available? Can data be consolidated on a global scale?
	2. Provide an explanation of the support structure for issue escalation in your IT organization.
	3. Will your company require any [enter Company name] provided hardware for any type of project for the services requested in this RFP.
	4. Will [enter Company name] be provided with a permanent test environment? What is the testing support for clients when client has a system change or updates (IE Oracle)? What is the testing support for clients when client has a system change or update to platform(s)? How much advanced notice must be provided for dedicated IT testing support?
	5. Describe your IT infrastructure.
	6. If applicable, does your company provide mobile applications?
Contract & Pricing	1. Please see the Master Services Agreement for this engagement [attached] and return review and edits with your RFP submission.
	2. Please confirm the proposed pricing to [enter Company name] is that which is offered to your top-tier customers.
	3. Please detail and describe you tiered pricing options as it pertains to the information in this RFP and subsequent information passed to your company by [enter Company name].
	4. Please review and fill-out the rate sheet [attached] and return with your submission of the RFP.
	5. How can [Company] maximize its financial incentives and positioning based on the known requirements of this RFP?
Risk	1. Are there any changes or modifications to the current business model and offering which would alter delivery of your company's hosting services to [enter Company name]?
	2. How do does your company manage risks to the organization and customer base?
	3. Please provide your Dun & Bradstreet number:
	4. When risks are discovered within your company, how quickly do you provide feedback to your customer base?
Quality	1. How does your company measure a seamless and customer-friendly implementation (where applicable)?

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	2. Once implemented/integrated, how does your company measure a successful managed hosting services customer over a three-year engagement?
	3. How do you maintain excellent customer service and account support? Please provide examples.
Innovation	1. Please outline any innovative strategies your company has implemented to your managed hosting services solution in the past three (3) years and what innovations are in pipeline for the coming three (3) years.
	2. How does your company measure internal innovation to that of your closest competitors?
	3. Are test environments made available to [enter Company name] prior to upgrades?
	4. How does your company integrate innovative upgrades without impacting the customer's current day-to-day business?
Cultural Fit	1. Based on your understanding of [enter Company name] culture and vision; how will you company align with our core values and people?
	2. What does your ideal customer look like?
	3. From a cultural and internal personnel standpoint; how is your company cultivating itself and investing in its people? What is your five (5) year plan?
	4. Please define your company's communication approach and service process in detail.
	5. What have been the results of your most recent employee satisfaction/engagement surveys?
References	1. Please provide a minimum of three (3) managed cloud hosting services customer references who are of like size and scope as [enter Company name].
	2. Please provide one (1) potential managed cloud hosting services customer reference who engaged your company in the RFP, however, did not award your company.
	3. Please provide one (1) managed cloud hosting services reference of a previous customer who has left your company in the last twelve (12) who was procuring the same services as [enter Company name].

9) Pricing/Rate Sheet:

Pricing/Rate Sheet Insight [delete italics and replace with your information]

Set a specific rate sheet can be beneficial for suppliers to provide bids. This is also advantageous to the key decision makers at it provides a side-by-side costing analysis of services. An approach to consider is to eliminate a rate sheet and allow for suppliers to provide a cost structure which they believe will be a best fit for the organization. In this approach, ensure normalization of bids is possible.

Pricing/Rate Sheet Sample

Pricing
Worksheet.xlsx

10) Timeline

Timeline Insight [delete italics and replace with your information]

Create an in-depth RFP timeline with coordination from all stakeholders (BU, IT, Legal, etc.). This will provide significant advantages in maintaining timeliness, strong engagement and project management.

Timeline Sample

Please review the RFP timeline (below) and contract [RFP owner] with any questions or concerns.

Action	Date	Accountability
NDA signed and returned	*xx/xx/xxxx*	*Suppliers*
RFP Document Issued	*xx/xx/xxxx*	*Company*
Intention to Participate	*xx/xx/xxxx*	*Suppliers*
RFP clarification Deadline for Vendor questions Q&A′s received	*xx/xx/xxxx*	*Suppliers*
Q&A Calls	*xx/xx/xxxx – xx/xx/xxxx*	*Suppliers & Company*
RFP Submission Date	*xx/xx/xxxx*	*Suppliers*
Supplier Presentations – On/Off Site	*xx/xx/xxxx*	*Suppliers & Company*
Down Selection of Shortlist Vendors	*xx/xx/xxxx*	*Company*
Discussions with Shortlist Vendors (potential requirement for site visits)	*xx/xx/xxxx – xx/xx/xxxx*	*Suppliers & Company*

Contract and Pricing Negotiation	*xx/xx/xxxx – xx/xx/xxxx*	*Company*
Award	*xx/xx/xxxx*	*Supplier & Company*
Planning	*xx/xx/xxxx – xx/xx/xxxx*	*Supplier & Company*
Project Kick-Off Implementation	*xx/xx/xxxx*	*Supplier & Company*
Project Go-Live	*xx/xx/xxxx*	*Supplier & Company*

11) Terms and Conditions

Work with your Legal department on a comprehensive list of terms and conditions for RFPs to ensure all liabilities are covered. [delete italics and replace with your information]

a) *This RFP is for discussion and evaluation purposes of the contemplated transaction only. Submission of a response to this RFP is expressly conditioned upon Partners' agreement to the terms set forth herein. For clarity, this RFP or any response from Partner to this RFP shall not constitute a binding agreement until Partner and Company have duly executed one or more definitive agreements. Company and the Partner shall be bound by the terms of the mutual confidentiality and non-disclosure agreement entered between the parties.*

b) *Company reserves the right to accept other than the apparent lowest priced proposal and to accept or reject any proposal in whole or in part or reject all proposals with or without notice or reasons. Company may amend, supplement, or withdraw the RFP at any time.*

c) *All answers to this proposal must be numbered as per the corresponding number of each question and must follow the same format as this RFP.*

d) *Quantities stated in this RFP are for informational purposes only and shall not be binding on Company. Such information supplied by Company is for the convenience of the respondents only and Company makes no warranty regarding the accuracy of any data or information provided.*

e) *Any costs incurred by a respondent to this RFP in connection with the preparation or submission of a response or any other expenses attendant thereto are the sole responsibility of that respondent and neither Company nor any of its business units, affiliates or subsidiaries has any obligation, under any circumstances, to reimburse or otherwise compensate the respondent for expenses so incurred.*

f) *Respondent shall not issue or cause the issuance of any press release or other publication of the existence of this RFP without the prior consent of Company.*

g) *Respondent shall not publish photographs or articles, make speeches about, or publicize the existence or scope of any agreement resulting from this RFP without first obtaining prior written consent from Company.*

h) *The preparation of a response to this RFP shall serve as evidence of the respondent's acceptance of the terms contained herein.*

i) *If a respondent should decline to offer a proposal, all materials and information received pursuant to this RFP shall be promptly returned to Company and any copies made thereof shall be immediately destroyed.*

j) *This RFP, all information contained herein, and all Company specifications and samples provided herewith shall be considered Company confidential information and subject to the mutual confidential disclosure agreement by and between respondent and Company.*

k) *All suppliers receiving such documents shall use them solely for responding to this RFP.*

l) The information contained or referred to in the RFP is not to be used, disclosed or released for any other use or purpose and must be returned to Company or destroyed when requested.

III. Supporting RFP Materials

A) Supplier List

Enter suppliers in the tracker (below). Organizing suppliers and their profiles will assist with supplier communications as well as on-going negotiations throughout the RFP.

Supplier	Supplier Contact	Contact Phone	Contact Email	NDA Signed	Current Supplier	Current Supplier Spend	BUs Supported	Supplier Risk
1	*John Doe*	*(xxx) xxx-xxxx*	*@company.com*	*Y/N*	*Y/N*	*$0.00*	*Marketing, HR, etc.*	*Low, Med., High*
2								
3								

B) RFP Assessment

Partner with all key decision makers to determine scoring criteria and associated weights. Aggregate scoring from all stakeholders and present the findings. This will provide talking points, maintain engagement and generate an award output for the supplier who scores the highest which will greatly assist in the decision-making process. The worksheet (below) is preconfigured for an assessment.

Supplier
Assessment Worksh

IV. About Blackline Group

Blackline has been helping companies overcome critical procurement issues for more than a decade. In that time, we've helped some of the world's largest companies transform more than $100 billion in total spend.

Blackline's agile approach aligns with customer's desire for easy to consume improvements. The results speak for themselves; our clients are consistently awarded top industry honors for setting the bar in Procurement.

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